Facilities Management
Service Technician

IBM TRIRIGA

Training Guide

Version 3.1

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About This Training Guide

TRAINING GUIDE DESCRIPTION

This training guide covers the use of IBM TRIRIGA, a web-based Facilities Management application that supports facility operations and maintenance, project management, space reservation, site planning, and contract management. Users will learn how to complete processes for the generation and management of work tasks, building systems and equipment, reports and forecasts of occupancy, condition assessments, capital improvements, and contracts.

TRAINING GUIDE OBJECTIVES

In this training guide, you will:

- Review Facilities Management foundational knowledge
- Identify the setup and configuration of projects and portfolio objects
- Perform common operations functions
- Review the available reports in TRIRIGA

TERMINOLOGY

The terms listed below are used throughout this training guide.

Table 1: Terminology

Term	Description
Approvals	Ensure that created and modified records meet the defined business requirements.
Assets	Owned or leased items, such as buildings, equipment or vehicles that are tracked in the TRIRIGA system.
Capital projects	Large-scale goals, such as the construction of a building project that typically requires significant funding to complete.
Dashboard	Default page for each security group or user role that provides a snapshot of current activity.
Evaluation surveys	Used to follow up requests, maintenance, sustainability measurements, and space reservations with a questionnaire that provides feedback to the service provider on the quality of work performed.
Facilities projects	Smaller-scale goals, such as painting an office, moving cubicles, and handling plumbing or electrical repairs.
Home Page	Returns the user to the default Dashboard page and includes the available portals for that user based on assigned security.
Job Plan	The primary record in the preventative maintenance process that defines who is responsible for the work to be performed and identifies the building systems, assets, and locations that will be serviced, also referred to as the scope.
Notifications tab	A tab in each record that defines users who are notified of any changes or approval requirements.

Term	**Description**
Portals	The main application sections within TRIRIGA.
Portfolio portal	Central store of Locations, Organizations, People, Specifications, and Assets.
Preventative Maintenance	Work performed on a defined schedule.
Program record	Provides details about the higher-level business vision, business goals, or business objectives that govern and align the objectives across multiple inter-related projects.
Project	Defined by its general information, the team members, the scope, a schedule, and a budget.
Project Record	Used to manage all activity related to the completion of work for a specific project, including the tracking of costs, tasks, milestones, and resources.
Requests portal	Used to issue, manage, and track various requests.
Service Level Agreements (SLAs)	Used to define the contractual terms and conditions for maintenance service agreements.
Service Plans	Used to centralize the rules used to manage service requests and work tasks.
Utility meters	Used to track utility consumption data for locations.
Work Plan	Used to manage work groups and assign work through scheduling of resources.

LIST OF ACRONYMS

The table below lists the acronyms that are used in this training guide.

Table 2: Acronyms

Acronym	**Definition**
PM	Preventative Maintenance

1. Foundational Knowledge

Learning Objectives

In this lesson, you will:

- Examine the basic functionality of TRIRIGA
- Examine how projects are defined
- Examine the approval and notification processes
- Identify the available template functions

Lesson Overview

This lesson is an introduction to some of the key features and functionality of the TRIRIGA application platform. An overview of the integration between TRIRIGA and other State applications, such as Arizona Financial Information System (AFIS) and ProcureAZ is presented in this lesson. This lesson also introduces the workflow process and the use of templates to aid in the creation of new forms.

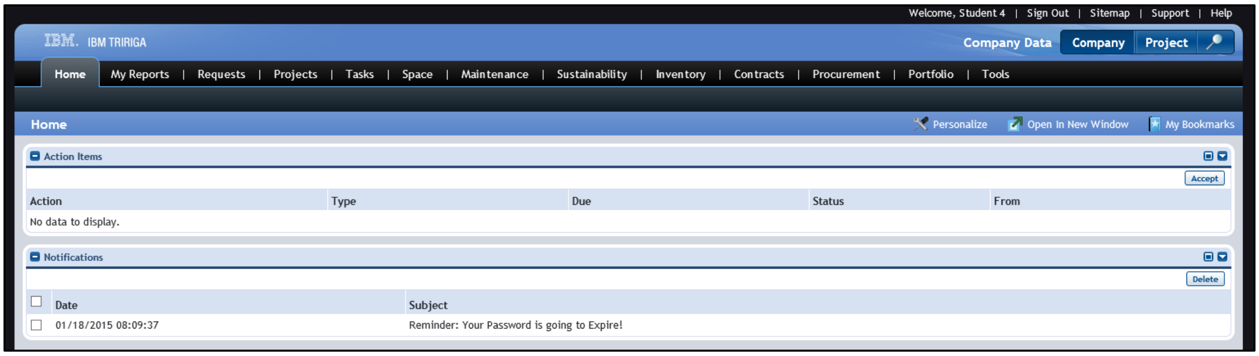
1.1. Overview of TRIRIGA Functionality

TRIRIGA is an Integrated Workplace Management System (IWMS) that integrates real estate, capital projects, facilities, operations, portfolio data, and energy management in a single web platform. Each of these components is presented as a portal that contains all of the related tables, forms, and menus for that business function. TRIRIGA also provides the ability to interface with other State applications for accounting and purchasing.

User roles play a key part in the software interface by controlling what portals and pages a user can access. Many aspects of the environment can be customized to a user's personal needs.

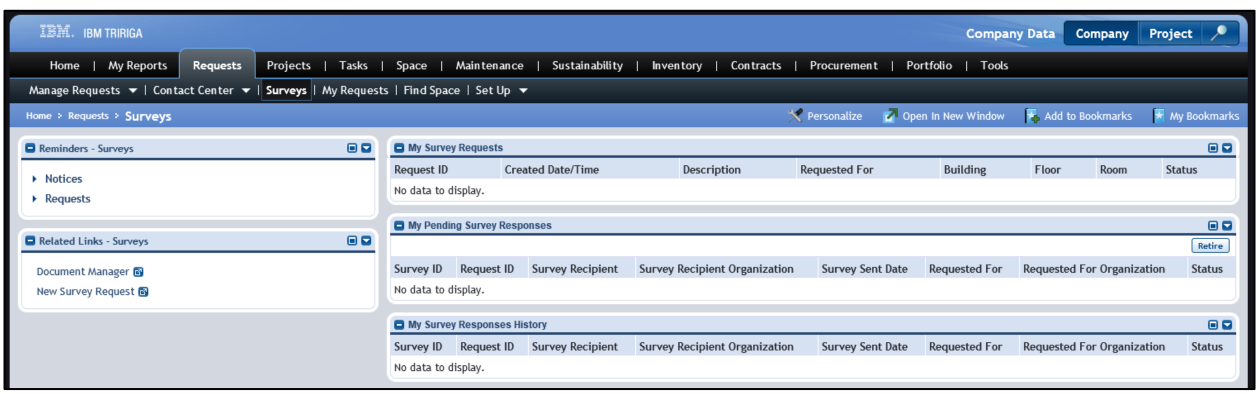
Home Page

The Home Page for a user lists the available portals across the top of the screen. Each portal contains pages, forms, and menus that are used to manage the records and actions stored in the database. Most users will see pending action items and notifications on their Home Page. The Last Visited section displays a list of recently accessed pages.



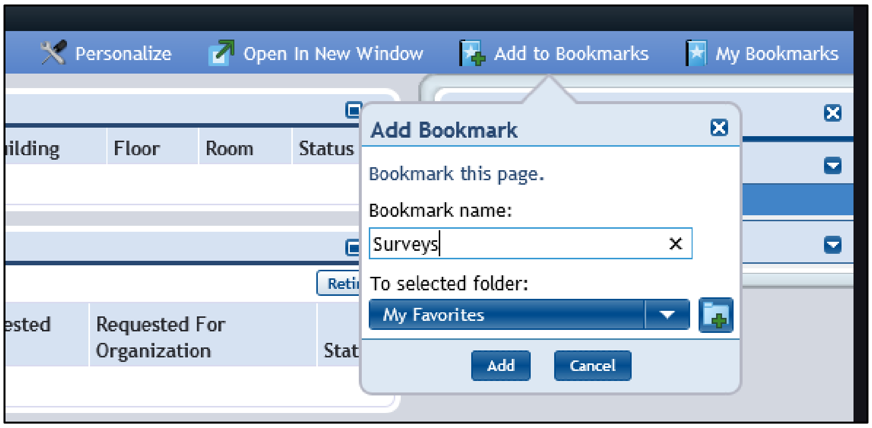
Landing Pages

Navigating to a portal by clicking its tab at the top of the screen will display the landing page for that portal that contains actions organized into menus and sections of relevant information. The sections can be expanded or collapsed if necessary. Many pages, forms, and sections can be viewed in the current browser window or opened in a new window using the Open in New Window action or icon. A breadcrumb trail allows users to navigate back to any page in the hierarchy of pages for that portal.



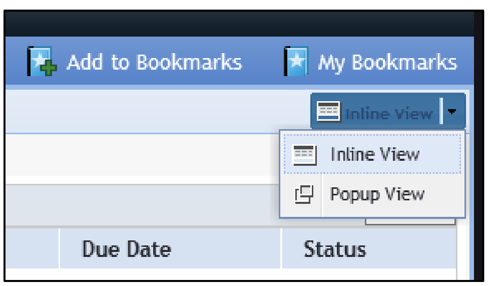
Bookmarks

Bookmarks allow users to save frequently accessed pages for faster navigation. Bookmarks can be organized into folders by clicking the Bookmark Folders dropdown option menu. Clicking Add to Bookmarks will allow the user to name and save the currently displayed page as a bookmark. Clicking My Bookmarks will display the user's saved bookmarks and folders. Clicking My Bookmarks again or the Close icon will close the Bookmarks section.

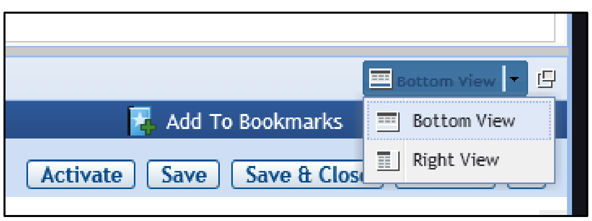


Change View

Pages that display a list of items in a table provide the user with the ability to view selected items Inline (view in the same window) or as a Popup (view in a new window). Switching between the two options will affect how pages are displayed.

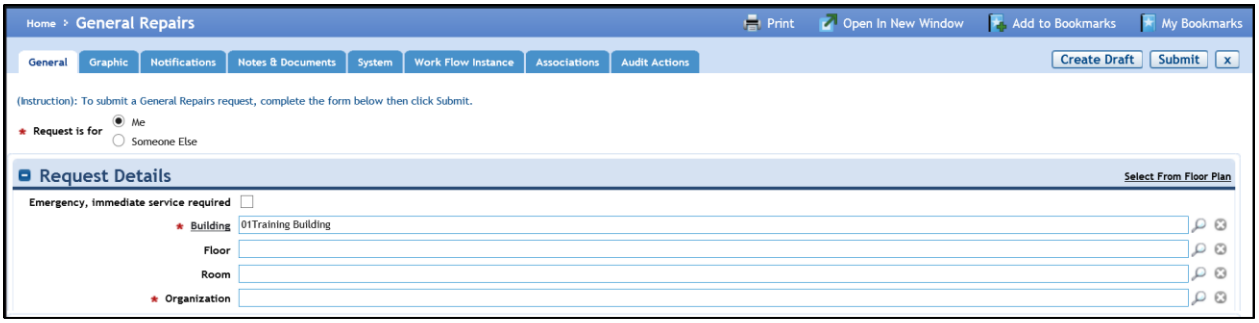


Some pages, such as the Locations page in the Portfolio portal, have additional view options. A Location record can be viewed in a bottom pane, or a right pane.



Forms

Forms are the documents that create and maintain information in the database. Forms are broken up into tabs and each tab can contain several sections and fields. On forms, required fields are marked with a red star. On completed forms, underlined fields can be clicked on to view the detailed information for the value in that field. A Status field identifies the stage of the record in the lifecycle.



Forms can be completed by users to record tasks, facilities maintenance requests, call center action items, space reservations, and real estate contract actions.

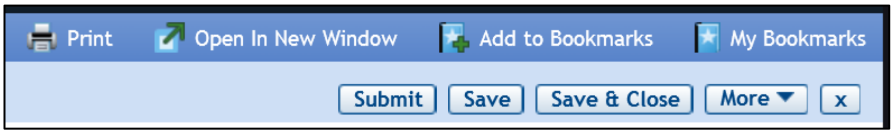
Form Tabs

The tabs at the top of a form represent the different areas of the record, such as contact details, history, locations, and notifications. Access to some tabs is determined by a user's level of security. Common tabs are shared across many types of forms and include:

- **Associations** – Displays a graphical view of the associations between this record and other records, business objects, and modules
- **Audit** – Displays the label of the action, name of the user, and date for each action that was applied to the record
- **Contacts** – Used to specify the contact information of the people, roles, and organizations that apply to the record
- **Locations** – Used to specify the area units, related addresses, and other location details for the record
- **Notifications** – Used to specify other approvers in addition to required approvers, and the people who receive notifications for each status change that is added
- **Summary** – Used to specify the currency and units of area, and to review the summarized details from other tabs in the record

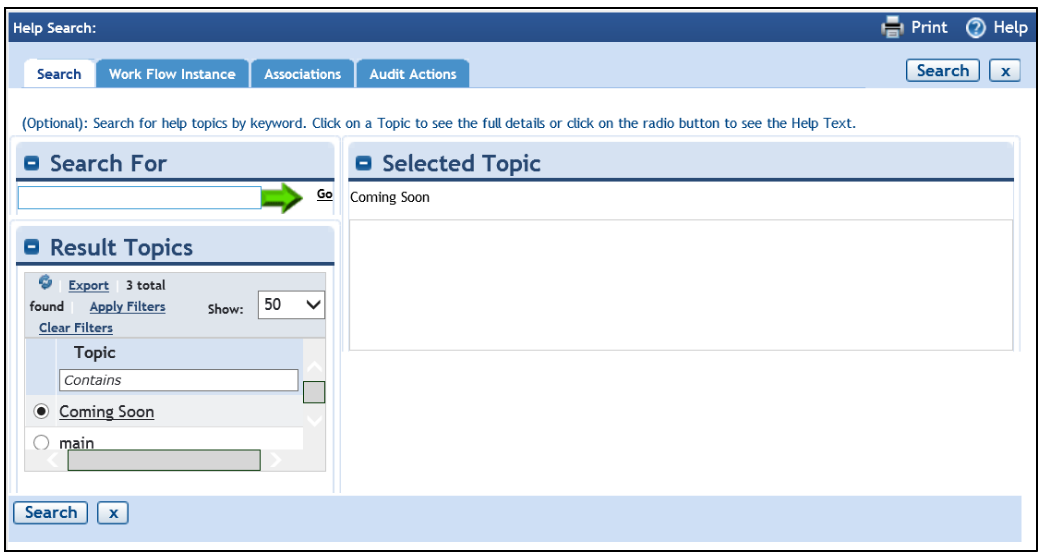
Printing

On most pages and forms a Print option is available in the top right of the section. Clicking the Print option will display the page in a print preview pop up window with a Print link in the top right corner which will allow the user to select the desired printing options.



System Help

System help is available in the top right corner of the application screen by clicking the Help link. System help contains a link to online documentation and resources as well as a searchable topic database. System help is a buildable resource where the topics are created by users with appropriate security.

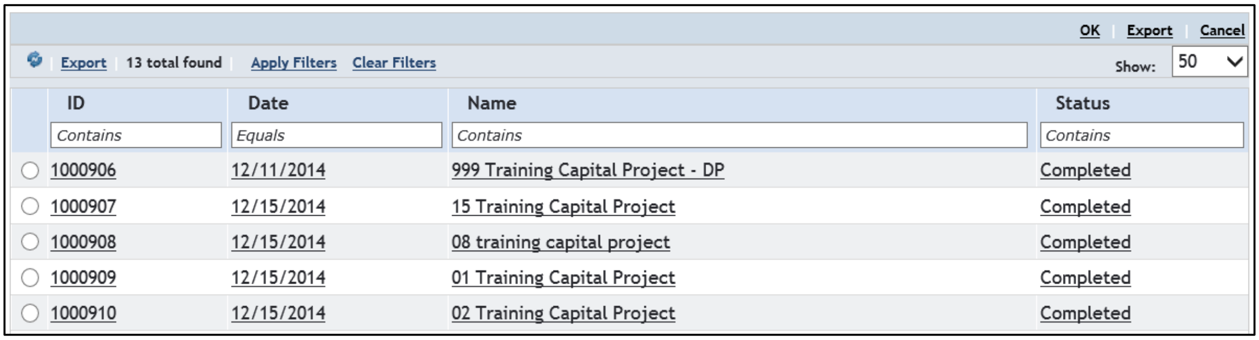


1.2. Project Defined

TRIRIGA provides the ability to manage capital, facility, and real estate projects. TRIRIGA can be used to identify funding priorities within capital programs, analyze project risk and financial benefits, and automate project management controls and alerts.

Project

Managing projects in TRIRIGA is done by switching to the Project component in the top right of the screen. Existing projects can be searched and selected by clicking the Select Project magnifying glass icon.



ID	Date	Name	Status
Contains	Equals	Contains	Contains
1000906	12/11/2014	999 Training Capital Project - DP	Completed
1000907	12/15/2014	15 Training Capital Project	Completed
1000908	12/15/2014	08 training capital project	Completed
1000909	12/15/2014	01 Training Capital Project	Completed
1000910	12/15/2014	02 Training Capital Project	Completed

A project is defined by its general information, the team members, the scope, a schedule, and a budget. The general information identifies the name, type, and address and client information for the project. A project can also contain subprojects called Child Projects. The team members are defined as project Contacts and must be assigned a project role. The scope defines all of the work being performed by the project. A project schedule can be broken down into tasks that can be tracked from start to finish. The project budget can be defined to enable the tracking of expenses incurred by the project and forecasting of potential changes to the project cost.

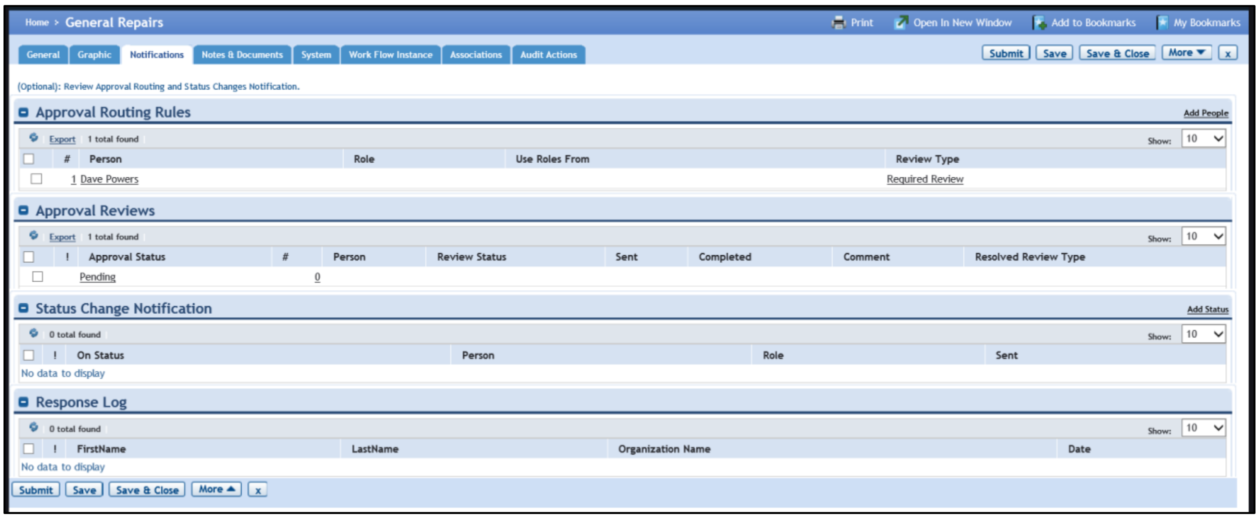
1.3. Approvals

Approvals ensure that created and modified records meet the defined business requirements. Approvals can be created to automatically escalate records to defined approvers. Users can delegate approvals, check the resolved actions of an approval, and add manual approvers. Any time an event occurs that triggers an approval, an action item appears on each reviewer's Home Page. Approvers can approve, return, request clarification, reassign, or escalate the record.

Approval templates are used to define approval requirements and can be applied to a type of record or business object(s). Approval requirements are used to connect an approval template to a business object and must have an active status to be used. If a business object or form has more than one requirement, the requirements are merged.

Notifications

The Notifications tab is used to create notifications that send an email to recipients each time the status of a record changes. For example, a notification can be sent to management whenever a purchase order is issued. The process involves creating the notification content and then creating the notification requirements. The notification requirement could be defined such that any purchase order with a status change of Draft to Needs Approval must be sent to the manager of the person who created the purchase order. Users can opt out of receiving notifications in their profile options and subscribe to notifications from a record that they want to receive notifications about.

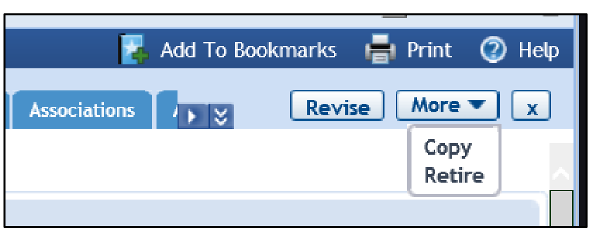


1.4. Using Templates

Using templates helps users save time by reducing the amount of data entry required for submission.

Forms

Forms typically do not have templates, but most forms that have been created and saved in the system can be used as a starting point for creating new forms with some information already entered. Users can create a copy of an existing form that is open, by clicking the More button, and selecting Copy. This creates a new form that can be accessed and completed with the appropriate information. Examples of forms that can have templates include People and Building Systems.



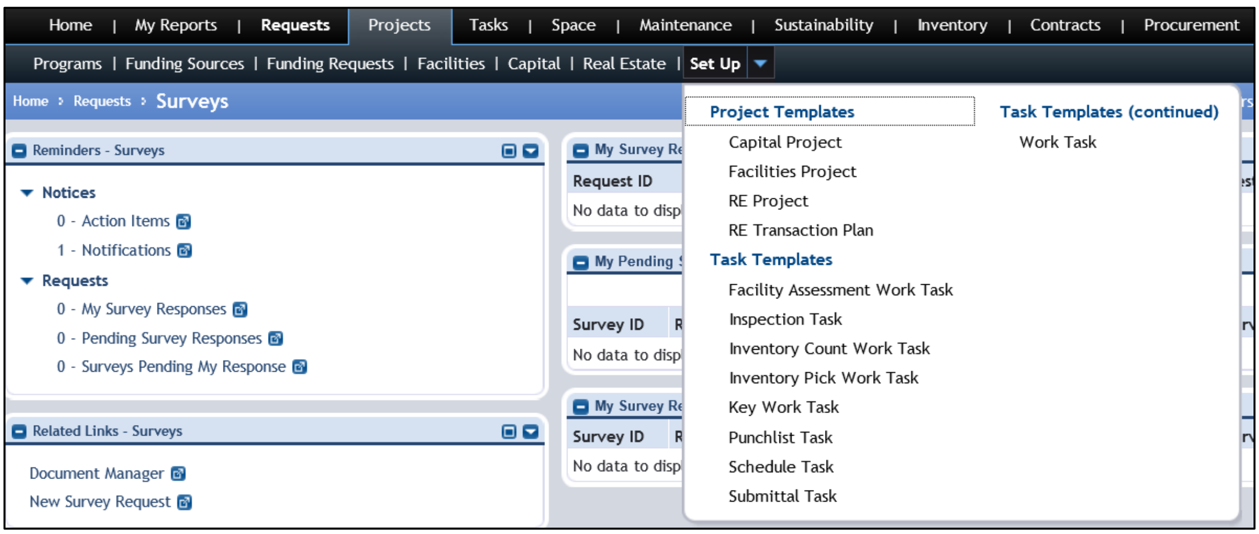
Surveys

Survey templates allow users to create and manage the templates used for creating evaluation surveys. Evaluation surveys are used to follow up requests, maintenance, sustainability measurements, and space reservations with a questionnaire that provides feedback to the service provider on the quality of work performed. Survey templates are created and managed in their respective portal under the Set Up menu.

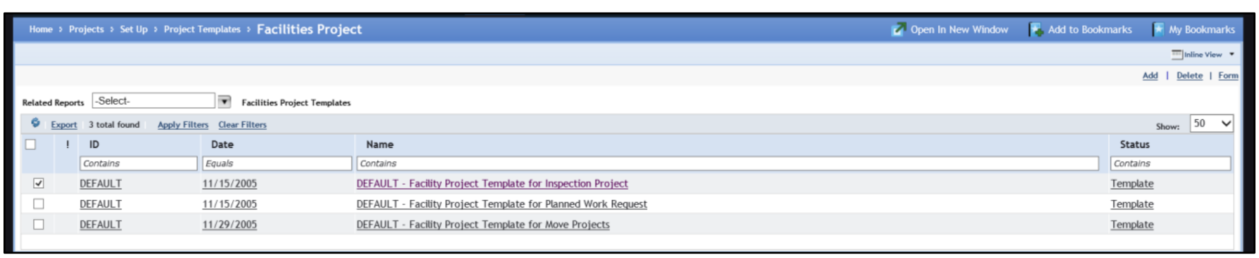
Once a survey template has been created, it can be issued as a New Survey Request in the Requests portal.

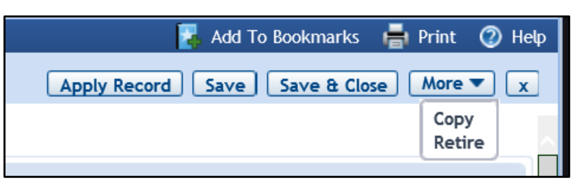
Projects

Project templates can be created for Capital, Facilities, and Real Estate projects. New templates can be created from scratch or existing templates can be copied which will create a duplicate of the template that can then be modified. Templates are managed in the Projects portal Set Up menu by selecting the type of template.



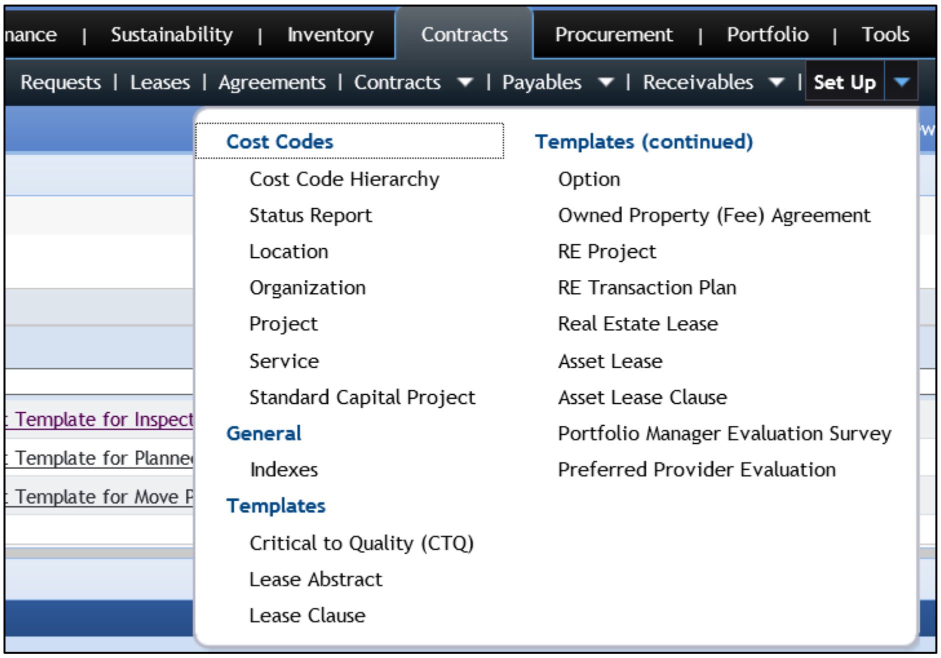
The Add link will create a new template. The More button, Copy command will create a copy of an existing template for use.





Contracts

Contract templates are available for the various types of contracts managed in TRIRIGA, such as Critical to Quality contracts. Contract templates are created and managed in a similar manner to Project templates.



Lesson Summary

In this lesson, you:

- Examined the basic functionality of TRIRIGA
- Examined how projects are defined
- Examined the approval and notification processes
- Identify the available template functions

Check Your Progress

1. All users see the same Home Page and portal tabs.

   a. True
   b. False

2. Approvals can be routed _________.
    a. Manually
    b. By delegation
    c. Automatically
    d. All of the above

3. Templates can be created for __________.
    a. Forms
    b. Contracts
    c. Surveys
    d. Both b and c

2. Setup and Configuration

Learning Objectives

In this lesson, you will:

- Identify the goals and configuration of the Organizational Structure
- Identify the goals and configuration of the Geographical Structure
- Examine available classifications

Lesson Overview

Portfolio data is the core information that is used to manage workplaces. The portfolio consists of information about the organizations, locations, people and assets that are associated with the space being managed. To assist in proper categorization of portfolio data, lists, classifications, geographies and specifications are set up as part of the initial configuration of the system.

2.1. Organizational Structure

Organizations are used to define the hierarchical structure of the enterprise. Organizations can also represent external companies such as vendors, tenants, landlords and customers.

The organization structure is hierarchal and set up based on a parent/child relationship. A parent organization record can have however many departments or divisions as necessary to represent the structure of the organization.

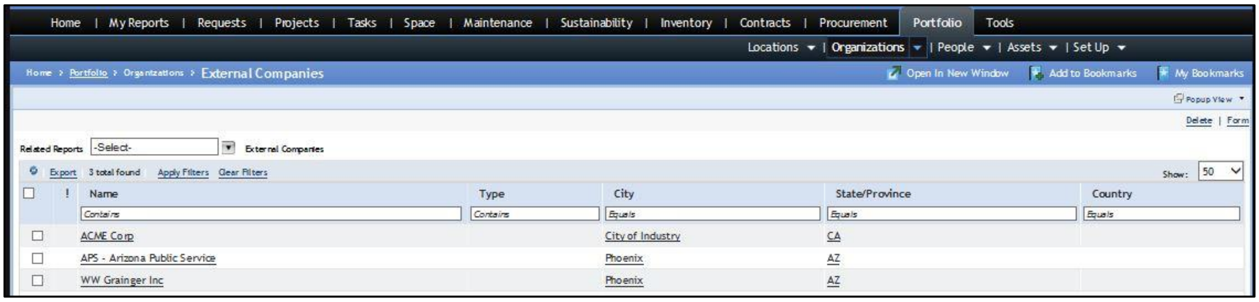
The organizations hierarchy can be included on various templates to define how work or approvals are routed.

Government

Government organizations represent departments that are part of the State. Each department is defined as an agency at the parent level of the hierarchy. Additional divisions related to those departments are created at the next level down in the hierarchy, also as agencies.

External Companies

External companies can be represented as vendors, customers, tenants, non-State partners or other governments. Any external organization that is related to the functions of facilities management within the system must have a record set up in the organizational hierarchy. Like government organizations, external organizations can have child divisions within their hierarchy.



Any facilities management related external organizations that are defined as vendors or customers will have a matching record in AFIS. AFIS will interface regularly with TRIRIGA to create external organizations. The automated set up of matching vendor records will assist in purchasing functions for work orders and real estate payments for 3rd party leases.

2.2. Geographical Structure

The geographical structure is used to define the geographical area of property specific to an organization. Similar to the organization structure, the geographical structure is hierarchal and set up based on a parent/child relationship. A parent geographical record can have however many dependent geographical units as necessary to represent the structure of the organization.

The typical hierarchal structure of geographical areas can include a combination of world region, country, state, region, metropolitan area, county and city. Because each department using TRIRIGA has a different geographical definition, the names of the organizational hierarchy have been used within the structure to indicate the structure specific to that department.

The geographical hierarchy can be included on various templates to define how work or approvals are routed.

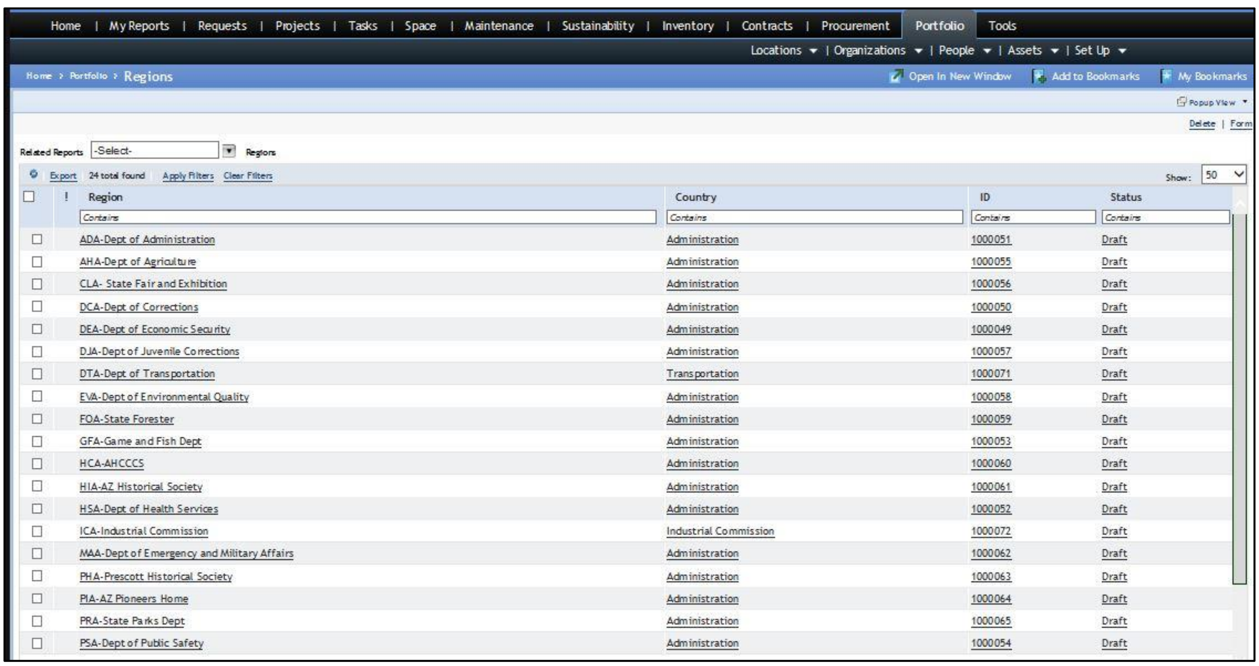
Country

"Country" is the top of the hierarchy which defines the organization with the highest geographical authority.

Country	World Region	ID	Status
Administration	North America	1000001	Draft
Industrial Commission	North America	1000000	Draft
Transportation	North America	1000002	Draft

Region

"Region" is defined as the organization that is responsible for any property within its geographical structure.



Region	Country	ID	Status
ADA-Dept of Administration	Administration	1000051	Draft
AHA-Dept of Agriculture	Administration	1000055	Draft
CLA- State Fair and Exhibition	Administration	1000056	Draft
DCA-Dept of Corrections	Administration	1000050	Draft
DEA-Dept of Economic Security	Administration	1000049	Draft
DJA-Dept of Juvenile Corrections	Administration	1000057	Draft
DTA-Dept of Transportation	Transportation	1000071	Draft
EVA-Dept of Environmental Quality	Administration	1000058	Draft
FOA-State Forester	Administration	1000059	Draft
GFA-Game and Fish Dept	Administration	1000053	Draft
HCA-AHCCCS	Administration	1000060	Draft
HIA-AZ Historical Society	Administration	1000061	Draft
HSA-Dept of Health Services	Administration	1000052	Draft
ICA-Industrial Commission	Industrial Commission	1000072	Draft
MAA-Dept of Emergency and Military Affairs	Administration	1000062	Draft
PHA-Prescott Historical Society	Administration	1000063	Draft
PIA-AZ Pioneers Home	Administration	1000064	Draft
PRA-State Parks Dept	Administration	1000065	Draft
PSA-Dept of Public Safety	Administration	1000054	Draft

State/Province

"State/Province" is defined by the responsible organization to identify geographical areas specific to their business process. Geographical areas include, but may not be limited to region, unit, district or any other name that the organization uses at the lowest level of the geographical hierarchy.

2.3. Classifications

Classifications define how records are related to each other within the classification hierarchy. A classification is a type of record that defines various data elements contained within the operational records.

Classifications can be used by queries, forms and workflows to determine how a record is managed. Generally, classifications are pre-defined, but new ones can be requested if necessary.

Type, Class, Status, Category, Code, Use…

There are many classification types which allow a user to define general attributes about a data element. Classifications typically appear in a query format that is accessible by clicking on the magnifying glass to the right of the field, a list with a drop down menu or through a "find" query.

Lesson Summary

In this lesson, you:

- Identify the goals and configuration of the Organizational Structure
- Identify the goals and configuration of the Geographical Structure
- Examine available classifications

3. Operation Functions

Learning Objectives

In this lesson, you will:

- Identify the process involved in performing work tasks

Lesson Overview

This lesson examines many of the operational functions available in TRIRIGA for the management of assets, maintenance plans, and work tasks. The Portfolio is a central store of asset, location, and other records used throughout the system. Assets and specifications allow users to track and maintain detailed records for all owned equipment. Those assets can be maintained by performing regularly scheduled and as-needed maintenance work tasks.

3.1. Create Corrective Maintenance Work Task

TRIRIGA supports the creation and tracking of multiple request types. Corrective maintenance work tasks are issued upon request, either by using the self-service functions in TRIRIGA or after being received over the phone. Corrective Maintenance Work Tasks can also be created directly by a user with appropriate access.

State Process Overview

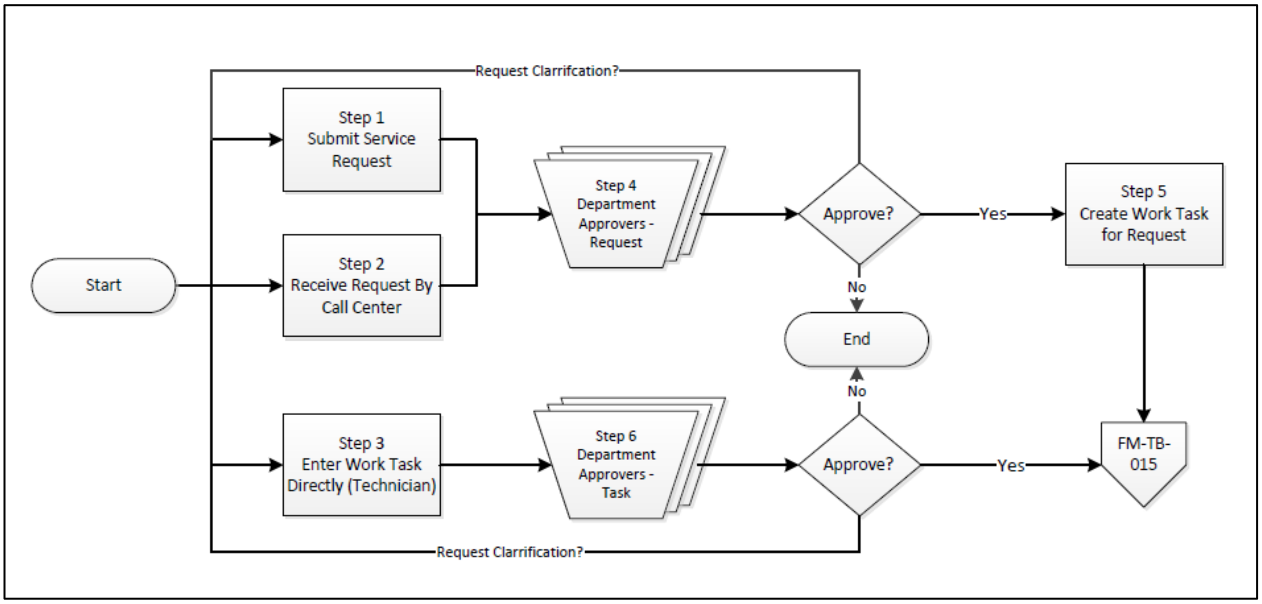
The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-013 (Create Corrective Maintenance Work Task) and represented by CROSSREF below.

1. A work request can be initiated using self-service functions, allowing employees to report maintenance-related issues. The requestor can complete an online form to enter the request. The request form prompts the user for the description, location, and type. The system sends a notification message to the requestor confirming receipt of the request and provides the requestor with a portal view to monitor the status of the submitted request.
2. As an alternative to the self-service request entry method, employees may report maintenance-related issues by contacting a centralized call center group. The call center can receive the request by phone or e-mail. While fielding the request, the call center can document the request in the system with information including the requestor name, description, location, and type. The call center option may also be used for emergency requests or in scenarios where the requestor does not have access to the system. Once the request is submitted, the system

creates a work task. The system sends a notification message to the requestor confirming receipt of the request. The process continues with Step 2: Create Work Task for Request.

3. Facilities groups may proactively identify maintenance related issues during routine building walkthroughs or during the performance of unrelated maintenance work. Maintenance team members are authorized to bypass the request process and enter work tasks in the system directly.
4. If the maintenance process is initiated using a request, then request approval can be utilized to ensure that the work request is aligned with departmental policies, goals, and budgets. Once the request is submitted by the requestor, department users are assigned to validate the request scope and priority by reviewing and approving request record information. The approver may make modifications to the request as necessary prior to approval, or request clarification from the submitter. If, after making updates or receiving additional information, the approver determines that the request is not valid or does not align with the department needs, the record is rejected and the process ends. The requestor will be notified that their request has been rejected. If the approver determines the request is valid, the record is approved.
5. Once a work request is submitted, the system will automatically generate the work task required to resolve the request. Approval of the request is optional and can be enabled to prevent creation of a work task without request approval. The process of managing the performance of the work task continues with To Be process FM-TB-015.
6. If the maintenance process is initiated using a work task directly, then request approval can be utilized to ensure that the new work task is aligned with departmental policies, goals, and budgets. Once the task is submitted by the technician, users are assigned to validate the task scope and priority by reviewing and approving task record information. The approver may make modifications to the request as necessary prior to approval, or request clarification from the submitter. If, after making updates or receiving additional information, the approver determines that the request is not valid or does not align with the department needs, the record is rejected and the process ends. The requestor will be notified that their request has been rejected. If the approver determines the task is valid, the record is approved and the process continues with To Be process FM-TB-015.

Figure 1: Create Corrective Maintenance Work Task (IM-TB-013)



Some of the request types that TRIRIGA supports include:

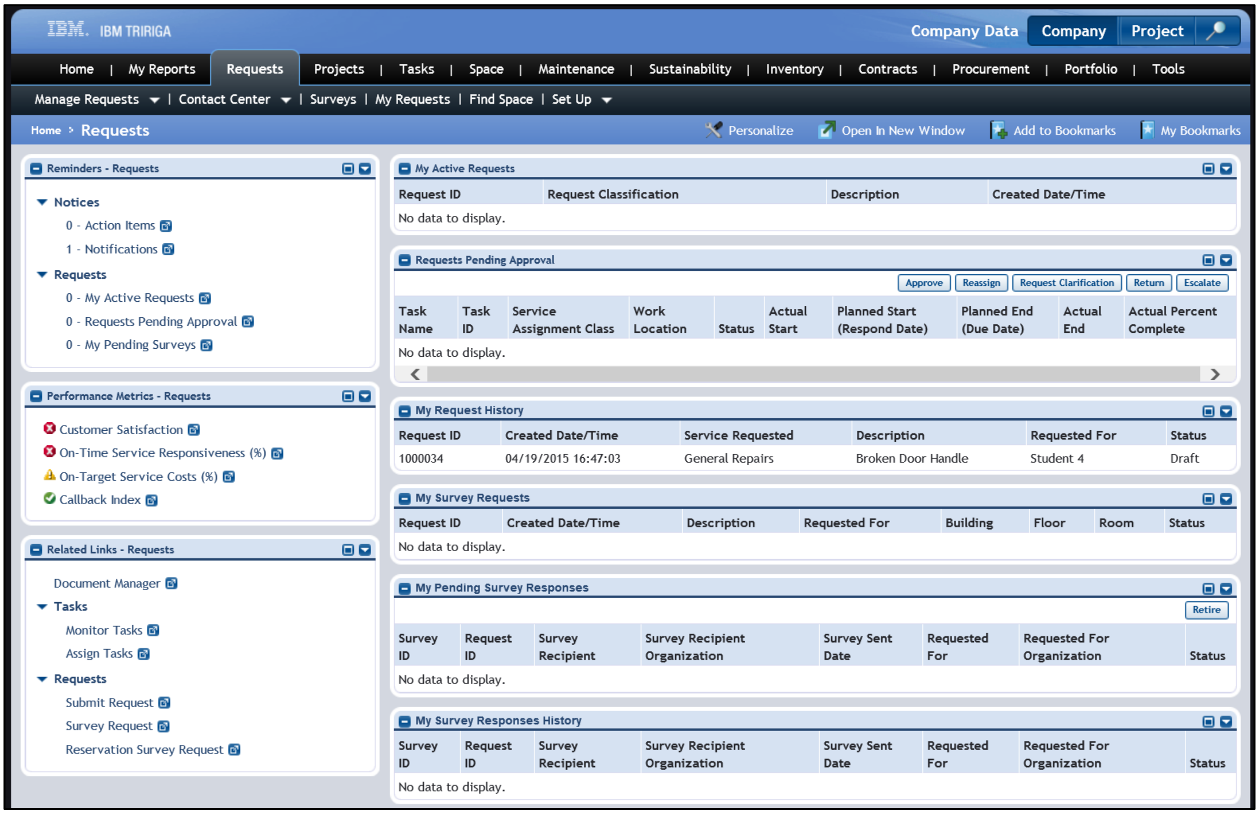
- **Electrical and Lighting**
- **Equipment Service**
- **Exterior Services**
- **Fixture and Furniture**
- **General Repairs**
- **Housekeeping**
- **Interior Services**
- **Key Request**
- **Plumbing and Leaks**
- **Security**
- **Temperature**

This lesson focuses on General Repair requests with the understanding that all requests are similar in nature but with minor specific differences in the details that pertain to the specific request type.

Submit Online Request

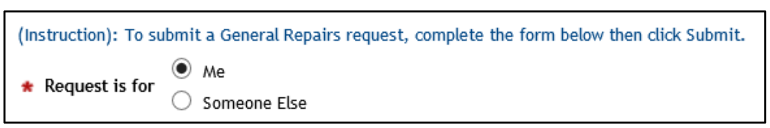
The Requests portal is used to issue, manage, and track the various requests for corrective maintenance in TRIRIGA. Users can create self-service requests for a variety of repairs and services.

In the Requests Portal, the Submit Request action in the Related Links – Requests section will display the types of requests that can be created. Selecting the type of request from the menu on the left will create the form used to complete the request. In this lesson, the focus is a General Repair request.



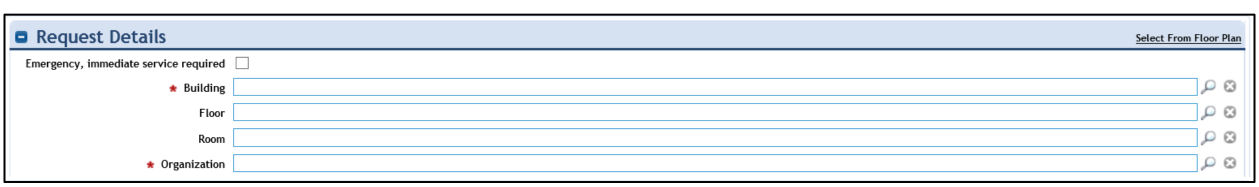
General Repairs

In the General Repairs form, select who the request is for, either Me or Someone Else. For Someone Else enter the contact information for the person the request is for.



Request Details

In the Request Details section, check the Emergency box if immediate service is required. Then enter the Building, Floor, Room, and Organization values as appropriate for the request.



Describe Your Request

Enter a description of the repairs or issue in the Describe Your Request section.

Other Sections

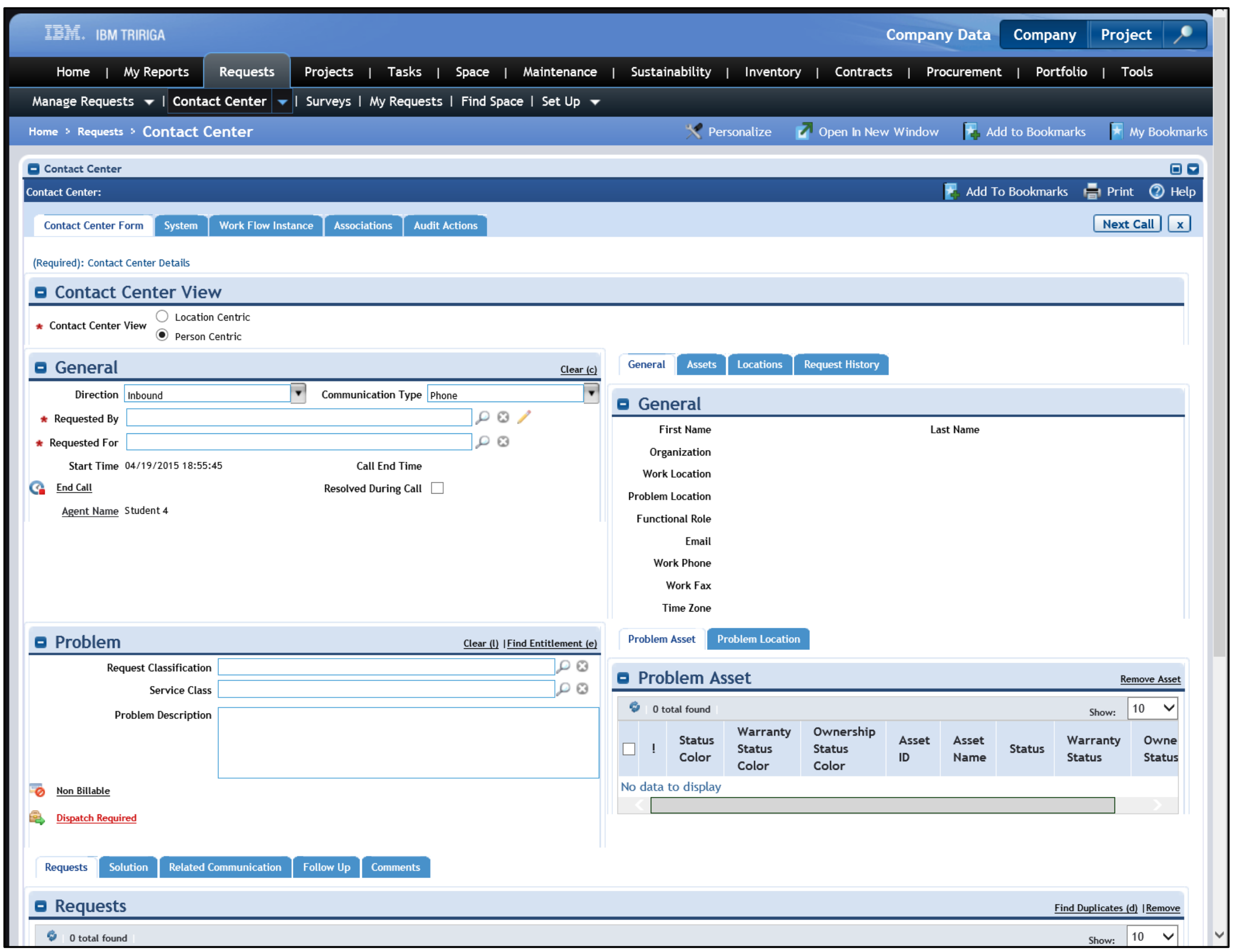
If the request is applicable to more than one Location, add locations by selecting the Find action. Select any Assets that the request is associated with. Enter any additional information in the Comments section and attach any documentation using the Upload action in the Related Documents section.

Save and Submit

When data entry is complete, the Create Draft button is used to save the request and the Submit button is used to submit the request. Users will see the status of their request in the Manage Requests portal. Requests will be listed in the My Request History section.

Receive Request by Phone

The Requests > Contact Center is used to record requests received by phone, email or other offline communication. On the Contact Center form, a call center user completes the necessary information for the request and then clicks Next Call to submit the request.



Contact Center View

In most cases, the Contact Center View should be left as the default Person Centric which will configure the form to logically record data entry based on a person making the request.

General

In the General section enter values for Requested By and Requested For (if not the same). Both fields are required and the Requested For field will inherit the value from the Requested By field. These fields also populate the content of the General and Primary Location sub-menus. Select a Communication Type from the list, Fax, Mail, or Phone.

Problem

In the Problem section, complete the following fields:

- **Request Classification**
- **Service Class**
- **Problem Description**

The assigned Request Classification will determine the Service Plan used for routing the request.

Locations

In the Locations sub-menu, assign any locations related to the request by selecting from the available items in the list. Click the radio button to add a location to the request record.

Assets

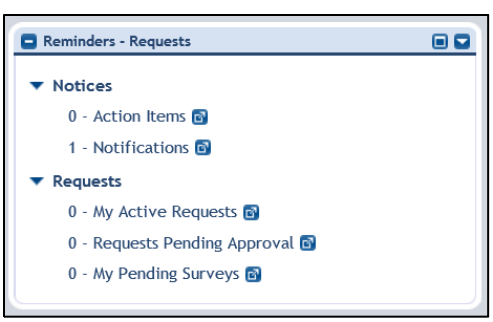
In the Assets sub-menu, assign any assets related to the request by selecting from the available items in the list. Click the radio button to add an asset to the request record.

Submit the Request

Clicking Next Call will create the request. Requests created by the Contact Center form behave the same as requests created in Request Central using the self-service form. If the request is approved, it is used to generate a work order or a project, as appropriate to solve the request.

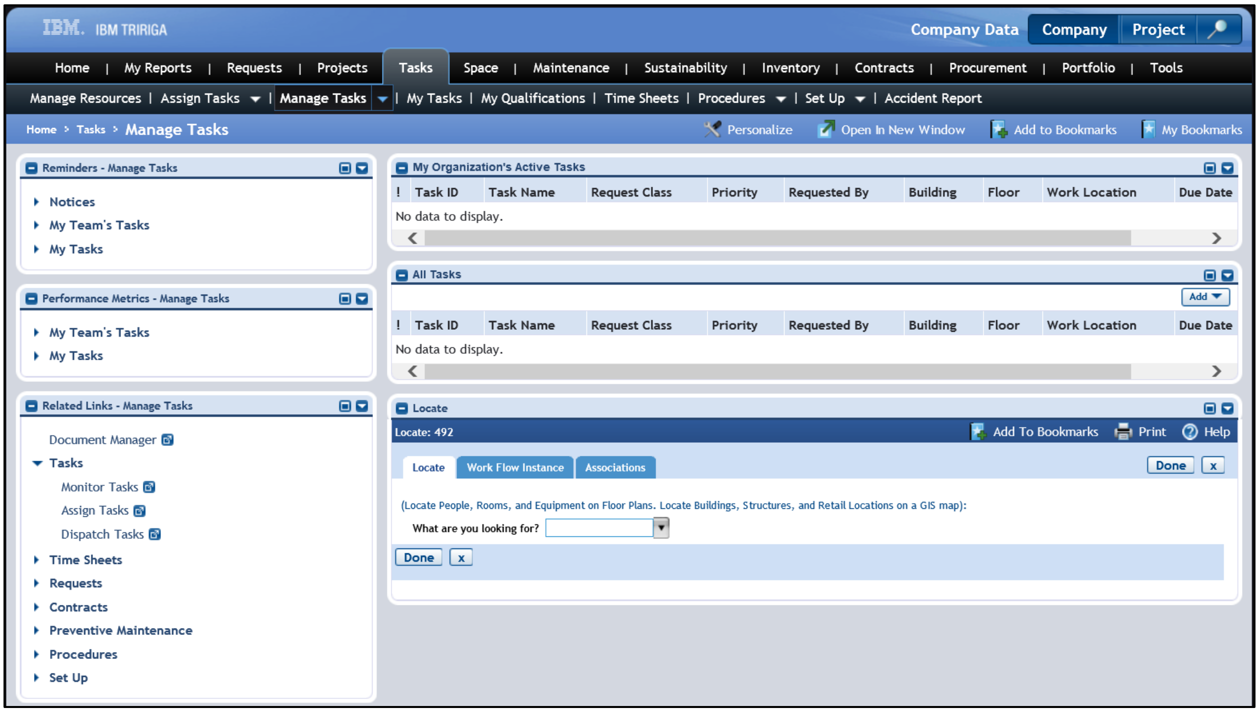
Review Request

A facilities manager should review requests before creating work tasks. Requests can be reviewed in the Notices > Notifications page in the Reminders section of the Requests page. In the Actions section, managers can approve, escalate, or reassign the request. They can also request clarification for the request. After review, if the request is valid, the manager can approve the request. If necessary, a comment can also be entered for the approval.



Create Work Task

When a Work Request is approved, an associated Work Task is created. Work Tasks are automatically created with the information from the Work Request. Work Tasks can be viewed in the Tasks > Manage Tasks portal using the Work Tasks option. Work Tasks can be filtered and sorted to find desired tasks. Clicking on a task will display the details of the task for review.



Activity 3.1

Create Corrective Maintenance Work Task

Scenario

You need to create a work task for a general repair in TRIRIGA. You will create the corrective maintenance request in the Requests portal and then create a work task to perform the repairs.

Setup

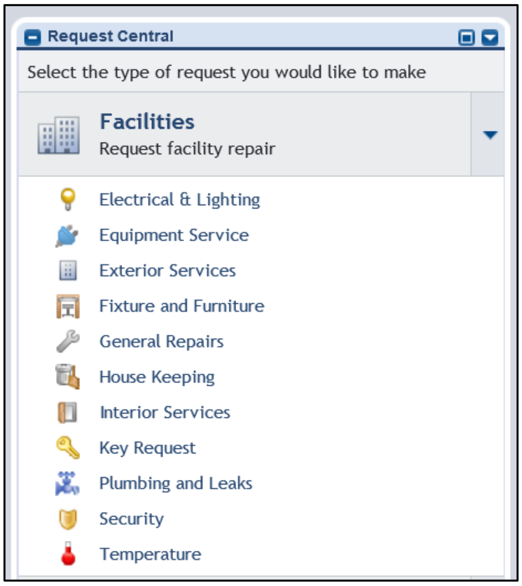
✓ User is logged in to the TRIRIGA Home Page.

Steps

A. Navigate to the Requests > Manage Requests portal.

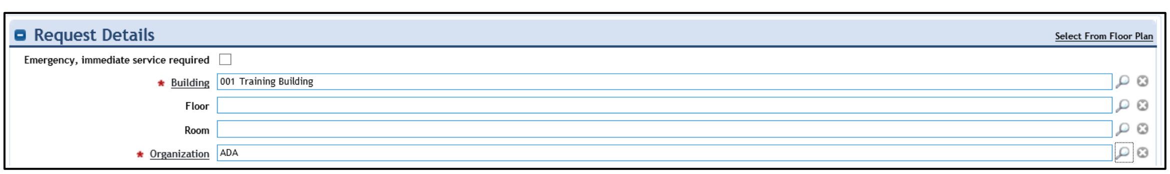
1. Click the **Requests** tab.
2. In the **Related Links** section, expand the **Requests** option.

3. Click **Submit Request**.
4. In the **Request Central** section, expand **Facilities** and click **Electrical & Lighting**.



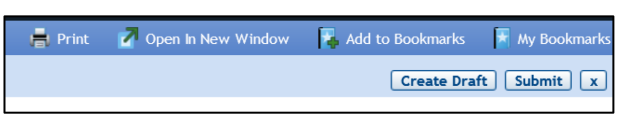
B. Complete the General Repair request form, Request Details section.

1. In the **Request Details** section, in the **Building** field, click the **magnifying glass** lookup icon.
2. Click in the **Name** filter field.
3. Press **Enter**. All possible values will be displayed in the list.
4. Select the **radio button** for **ST ##Training Building**, where **##** is your student number.
5. Click the **OK** action.
6. In the **Organization** field, click the **magnifying glass** lookup icon.
7. Select the **radio button** for **ADA**.
8. Click the **OK** action.



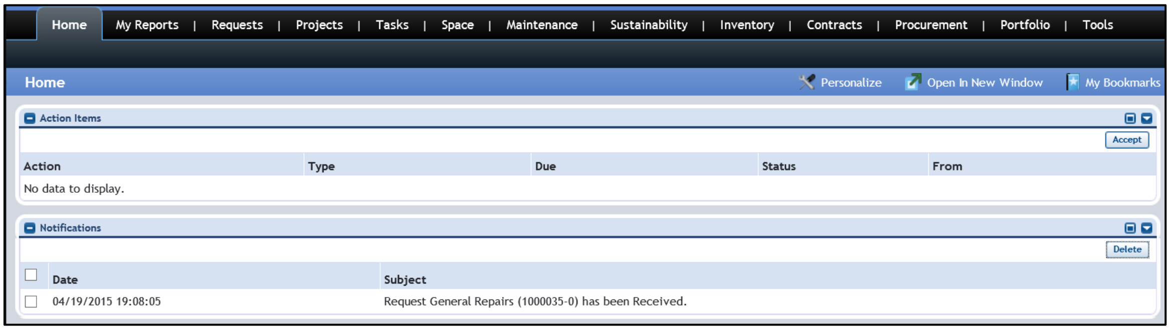
C. Complete the rest of the request.

1. In the **Service Request** section, select the **radio button** for **Lights Out**.
2. In the **Describe Your Request** section, in the text box, enter ## ***The lights are out,*** *where **##** is your student number*.
3. Click the **Submit** action.



D. Review the request.

1. On the **Manage Requests** page, in the **My Request History**, observe the request has been created.
2. Confirm notification in user **Home** portal that request has been received.



E. Approval of the request generates the Work Task.

3.2. Perform Work Task

TRIRIGA allows users to create, track, and manage work tasks utilizing a variety of tools and resources. Much of the work that is done in the system to manage tasks requires that some setup and configuration be completed first. After work is performed there are several follow-up steps that can be performed prior to closing out a work task and reporting on work performed. This topic will identify the processes involved in the completion of work tasks. The steps outlined in this section include the following:

- Assigning Resources to a Task
- Performing a Work Task
- Assigning Equipment to a Task
- Procurement of goods and/or services for a Work Task
- Closing Work Tasks
- Performing Work Reporting

State Process Overview

The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-015 (Perform Work Task) and represented by CROSSREF below.

1. Work tasks may be created as the result of multiple processes, including: corrective maintenance (FM-TB-013), preventive maintenance (FM-TB-014), equipment reservation (FM-TB-016), move projects (FM-TB-019), and space reservations (FM-TB-020). In any of these

scenarios, work task assignment can be performed automatically by the system, based on the work location and work problem type. If auto-assignment of the work task is not enabled, then the process continues with Step 2: Assign Work to Vendor or Workgroup. If auto-assignment of the work task is enabled, the process continues with the 'Internal Assignment' check. If work is assigned internally, the process continues with an additional check to determine if the work will be performed by another State agency. If so, the process continues to FM-TB-015-B to establish an internal exchange. If the work is done within the originating agency, the process continues to Step 3: Perform Work (Internal). If the work is assigned to a 3rd party maintenance vendor, the process continues with another decision point where a determination is made as to whether the mandated procurement processes can be followed. If the normal procurement process cannot be followed, for example, in the case of an emergency, the process proceeds directly to Step 9: Perform Work (External) and an alternate payment method may be used. Under most circumstances, however, the mandated procurement process will be followed, with the next step being to create a Purchase Request (FM-TB-015-A) in ProcureAZ.

2. In cases where the work cannot be auto-assigned, a user must manually review the request and determine the appropriate maintenance workgroup or organization to manage and perform the work. Once the manual assignment of work is performed, the process continues with the 'Internal Assignment' check. If work is assigned internally, the process continues with an additional check to determine if the work will be performed by another State agency. If so, the process continues to FM-TB-015-B to establish an internal exchange. If the work is done within the originating agency, the process continues to Step 3: Perform Work (Internal). If the work is assigned to an external vendor, the process continues with another decision point where a determination is made as to whether the mandated procurement processes can be followed. If the normal procurement process cannot be followed, for example, in the case of an emergency, the process proceeds directly to Step 9: Perform Work (External) and an alternate payment method may be used. Under most circumstances, however, the mandated procurement process will be followed, with the next steps being to create a Purchase Request (FM-TB-015-A) in ProcureAZ.
3. Once work is assigned, the internal workgroup is notified of the work assignment and provided with portal views of all assigned work. The internal workgroup supervisor can leverage work planning tools to balance the workload across workgroup staff. Work is assigned to a technician, and the work is performed. The technician is responsible for tracking and documenting the completion of the work, including time spent, materials used, meter reading information, and other relevant work information. The work performed may require equipment reservation out of inventory (FM-TB-016) or the purchase of new equipment/materials. In the case of the later, the normal procurement processes are expected to be followed. Once the work is performed, it is submitted for completion and the process continues with Step 4: Department Approvers.
4. Once work is performed and submitted for review, department users are assigned to validate work completion by reviewing and approving the work task record information. If the approver determines the work was not performed and documented to satisfaction, then the record is

rejected and returned for rework in Step 5: Send Task for Rework. If the approver determines the work was performed and documented completely, then the record is approved and the process continues with Step 6: Complete Work Task.

5. Work may be returned to the internal workgroup or external vendor for rework when the submitted work task is considered to be incomplete. The assigned organization would be required to perform additional work and/or supply additional information about the work performed. Once the rework is performed, the work task is submitted again for review, and the process continues with Step 4: Department Approvers.
6. Upon approval of the work performed, the work task status is changed to Complete. The record status change triggers automatic notification of work completion to the requestor (for corrective maintenance work).
7. For corrective maintenance work, if surveys are enabled for the request classification, a survey request will be sent to the requestor. The survey will ask the requestor to rate the quality of the service received. The survey results are used to help improve the performance of internal and external vendor organizations.
8. Once the work is completed, the work supervisor can manage the closeout of the work as required. Closeout of the work may be defined as a necessary step for vendor payment (AP-TB-013). Work related to a maintenance task will provide input into the managing of building systems and equipment (FM-TB-008), otherwise, the process ends.
9. A Purchase Order is required in order to begin work (AP-TB-009) with an external vendor. Once work is assigned, the external vendor is notified of the work assignment. The vendor is responsible for providing documentation of the completion of the work, including time spent, materials used, meter reading information, and other relevant work information. Once the work is performed, it is submitted for completion and the process continues with Step 4: Department Approvers.
10. TRIRIGA user determines the need for the external service. The process continues with Step 11: Offline Request for Purchase Requisition.
11. TRIRIGA Requests to Order require scheduled integration with ProcureAZ to allow for the approval, processing, and payment of work order costs. The TRIRIGA Request for Order will trigger a request for a Purchase Requisition in ProcureAZ. The process moves to Step 12: Create Pre-Encumbrance. In addition, if the Purchase Requisition is approved (all lines must be approved) the process proceeds to Step 13: Create Purchase Order. If it is rejected, it is sent back to Step 10: Request for Order Generated.
12. Integration between ProcureAZ and AFIS will create a pre-encumbrance transaction in AFIS to document the accounting postings.
13. Purchase Requisitions that have been approved will create a Purchase Order in ProcureAZ. The process then moves to Step 14: Create Encumbrance. In addition, if the Purchase Order is

approved, the process proceeds to performing the work. If it is rejected, it is sent back to Step 4: Request for Order Generated.

14. Integration between ProcureAZ and AFIS will create an encumbrance transaction in AFIS to document the inventory accounting postings.
15. Integration between ProcrureAZ and TRIRIGA will create a copy of the Purchase Order on the related Work Task. Any change orders to the Purchase Order in ProcureAZ will be reflected on the Work Task as well.

Figure 2: Perform Work Task (IM-TB-015)

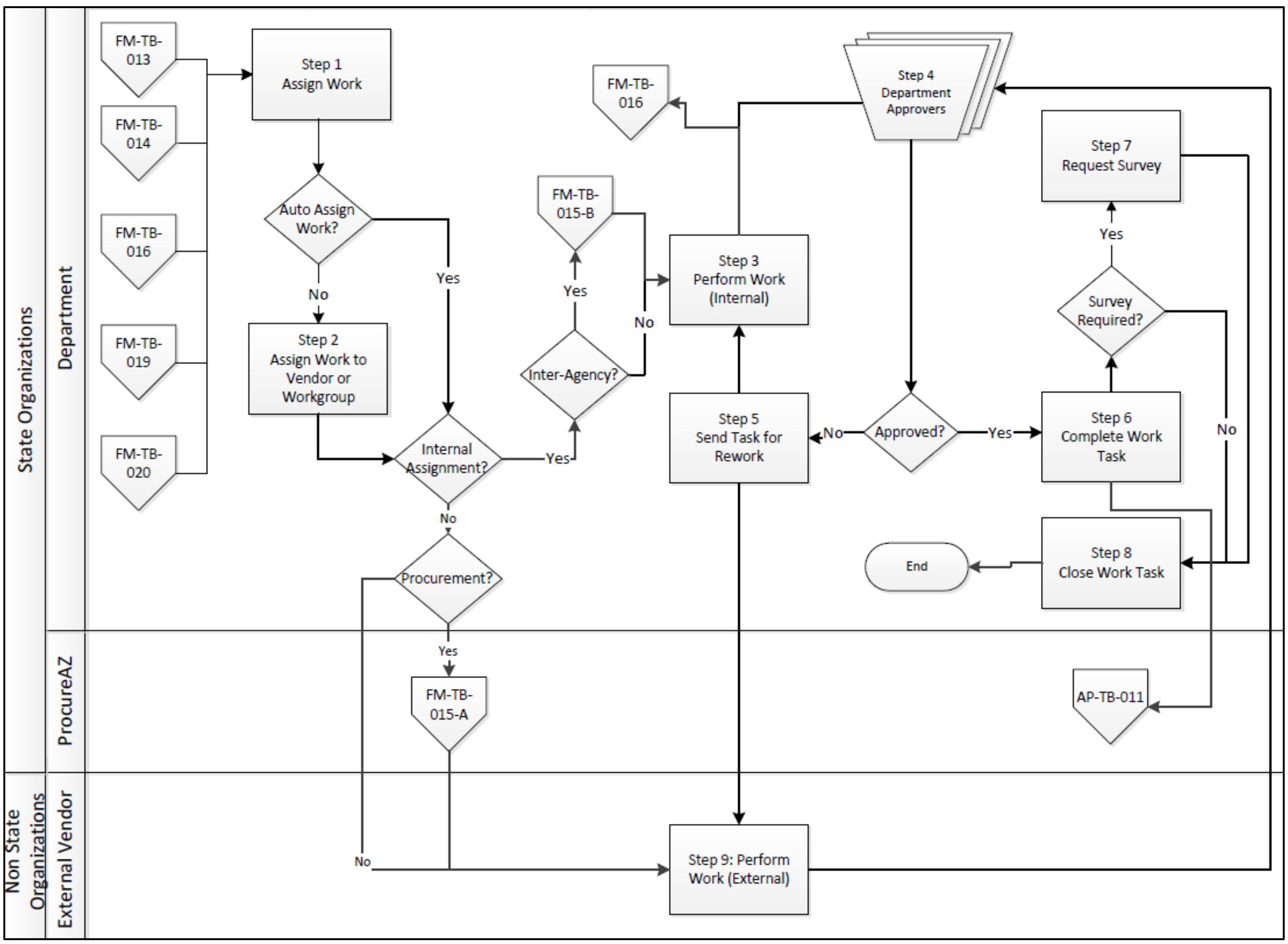


Figure 3: Perform Work Task (IM-TB-015a)

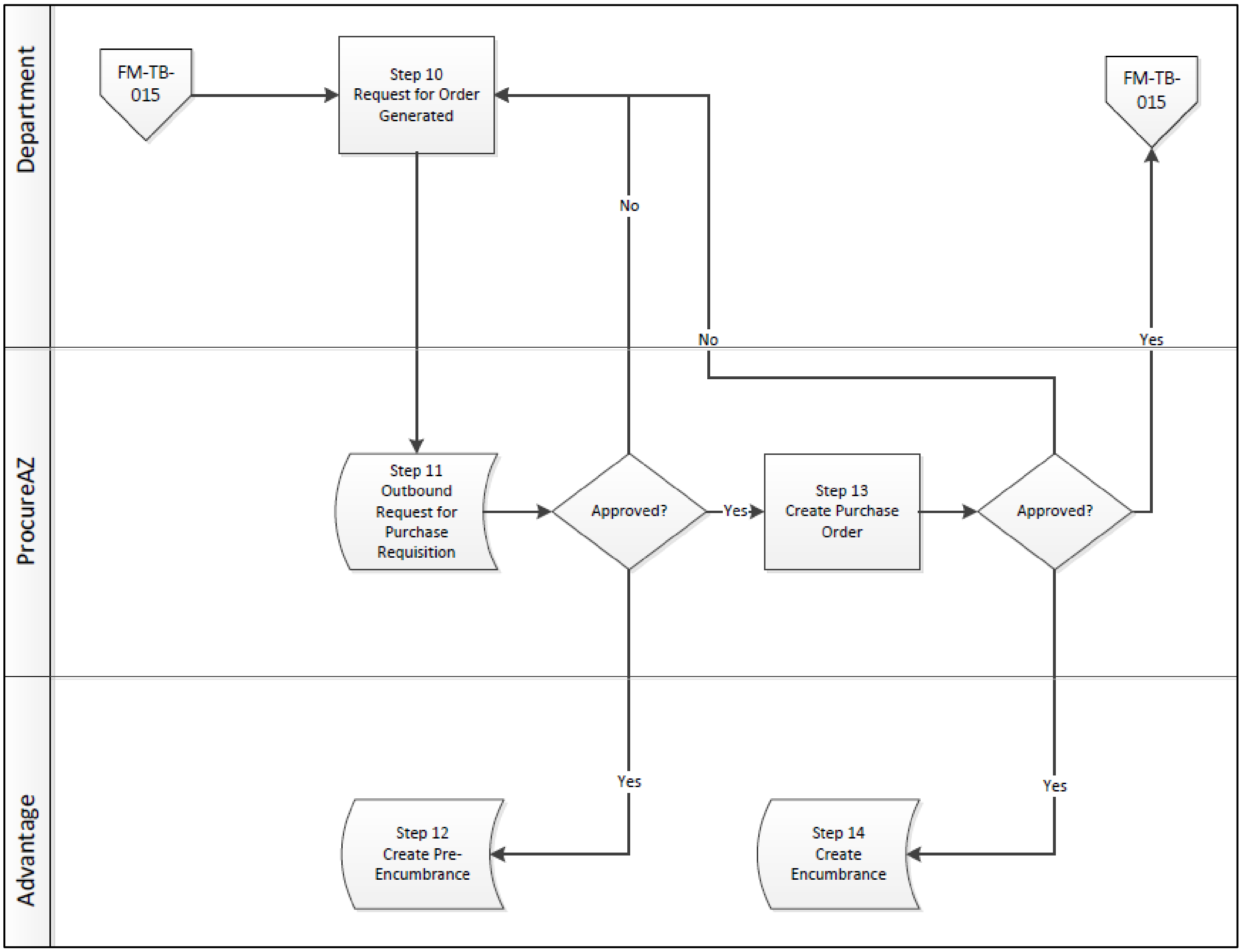
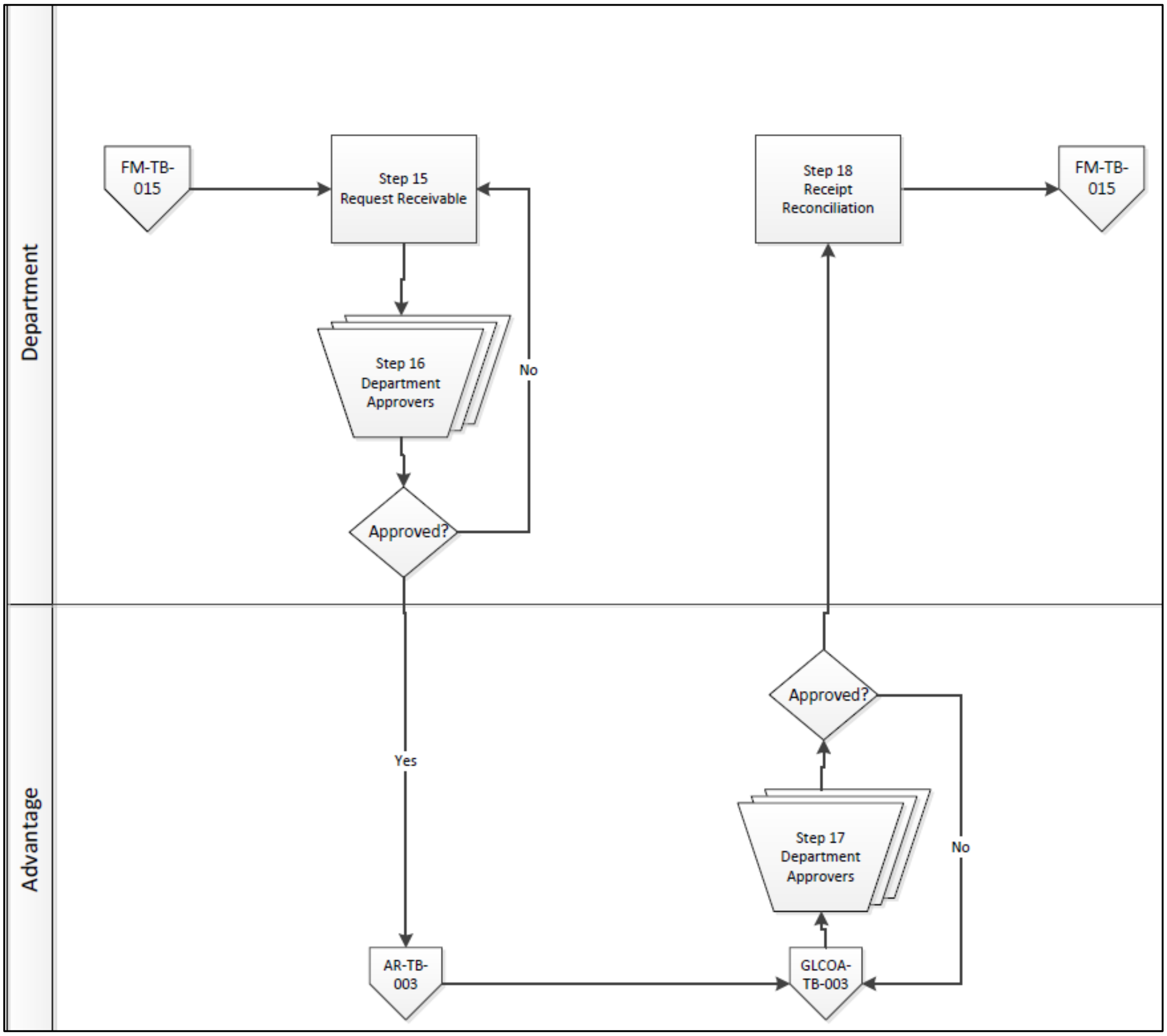


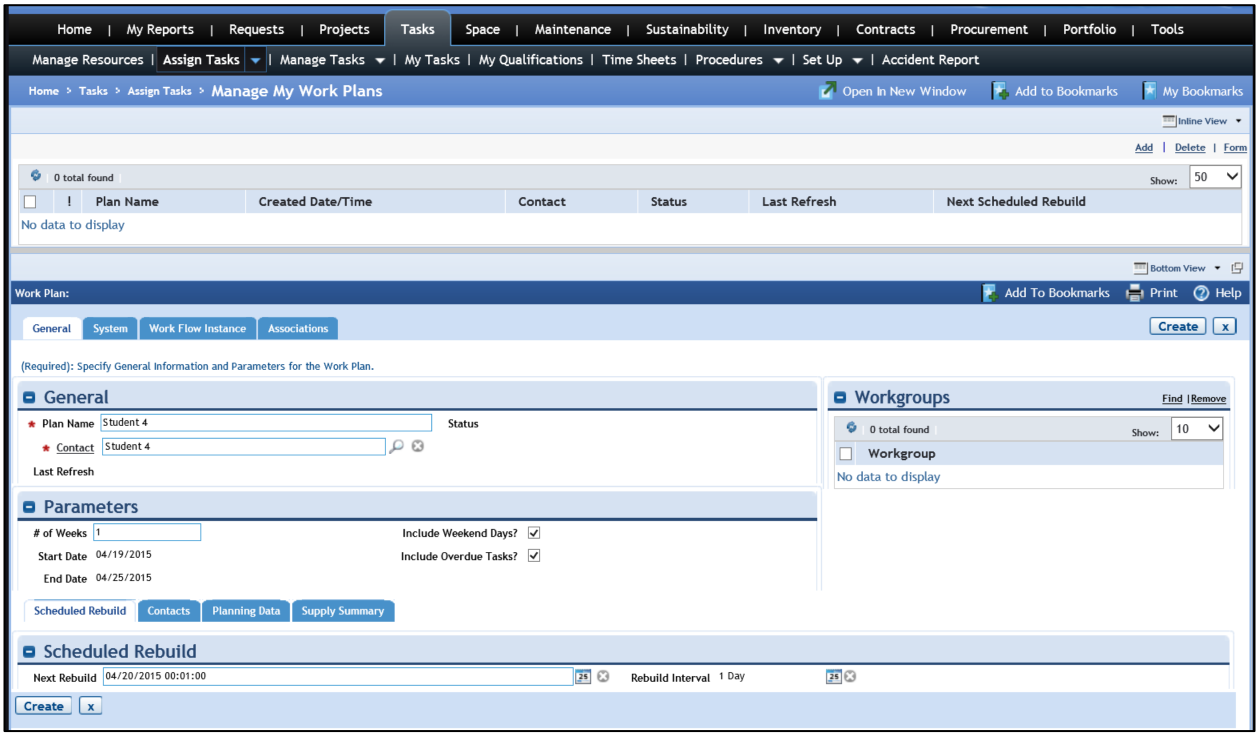
Figure 4: Perform Work Task (IM-TB-015b)



Assign Resources to a Task

Task assignment can occur in a number of ways, including automatic assignment to a responsible organization based on service plan settings and manual assignment via the dispatch manager. The goal should always be to do smaller cost (in money, time, and resources) maintenance in an effort to avoid larger, more costly repairs over the long term. The Work Plan allows maintenance managers to allocate resources to tasks efficiently by assigning service technicians based on the desired schedule.

The maintenance supervisor is responsible for managing work plans and teams of resources. A work plan is created by navigating to the Tasks > Assign Tasks portal, clicking Manage My Work Plans, and clicking the Add action.



Perform Work Task

Once a task is dispatched to the appropriate resource, some modifications to the work task can be made, including assignment of failure codes or descriptions of the work performed to resolve the problem. While work is in progress, the task may be put on hold and resumed as necessary, for example if there are missing parts, or by request of the person who initiated the request.

Once work is performed, the work task can be marked as Complete and details of the work performed, such as labor, hours, costs, and actual completion date/time entered.

Tasks assigned to a technician are displayed in the My Active Tasks portal section. Clicking a work task will open the task and allow the user to view the details including resources related to the task, task location, task description, and task planning dates. The technician can place the task on hold for parts or for requestor reasons and reactivate the task when necessary.

On the Work/PO Details tab, the technician can verify any procurement information that may be related to the task.

On the Resources tab, the technician enters any materials or equipment used to complete the task.

On the Work Task Info tab, the technician enters their own time, including the following information:

- Time Entry Date
- Time Category
- Hours
- Comment

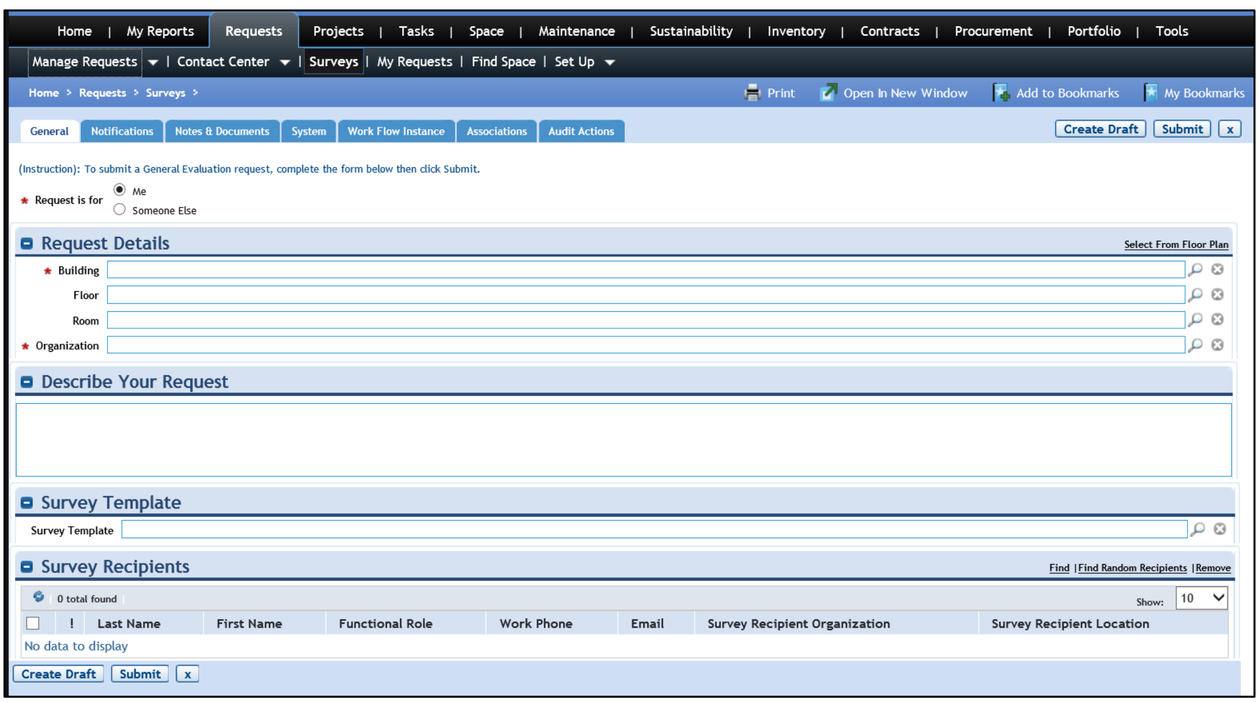
The technician can then save the changes using the Save or Save and Close action. If the task has been completed, the technician can update the work task status to Complete using the Complete action.

When a work task is marked as complete, related requests are automatically changed to Complete, the requestor is notified of the change to the request status, and the survey process is initiated if a survey template is attached to the request classification of the completed request record.

Perform Work Survey

If a survey template is assigned for the type of work that is requested, then a survey request will automatically be sent to the requestor after the service technician completes the work task associated with the request.

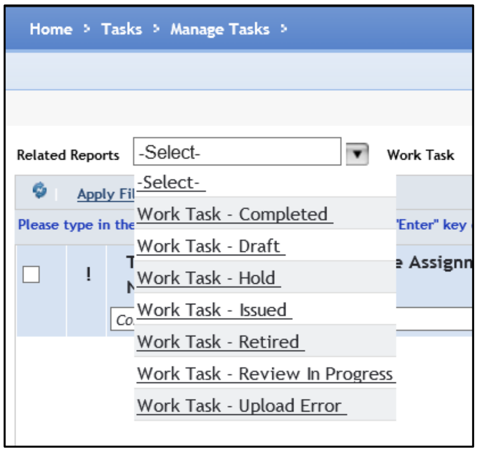
A survey request can also be manually created in the Requests > Surveys portal using the New Survey Request link.



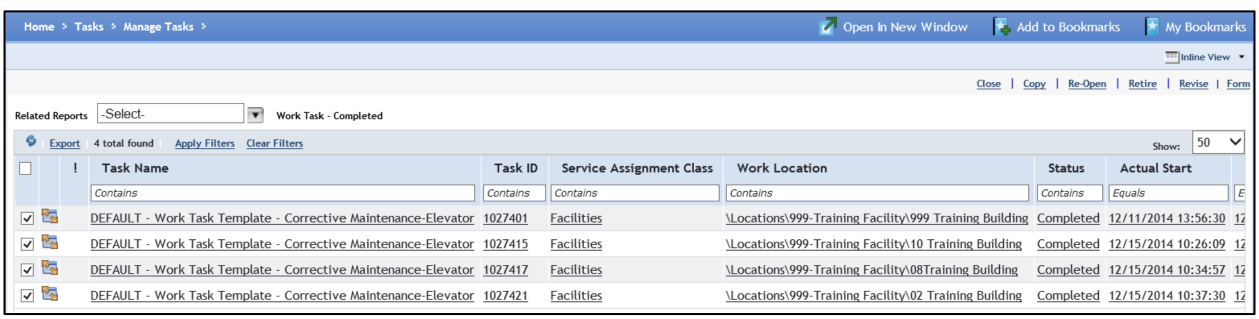
When a survey is sent to a requestor, the requestor will receive an e-mail notification about the survey request. Pending surveys are listed in the My Pending Surveys list accessed via the Request portal in the Reminders section. The user completes the survey questions and submits the record with the survey responses which are used to provide feedback to the service management team.

Close Work Task

Work tasks that have been marked as complete are considered ready for review and closeout. The closeout of a work task indicates that the work performed was accepted. Closed tasks can no longer be modified. Survey results or other information about the quality and completeness of the work performed should be reviewed prior to closing out the task. All task revisions should be completed prior to moving the work task from Completed to Closed.



If a completed work task is considered acceptable, the service manager can close the task from the work task record. From the work task form, clicking the Close action will change the task status to Closed. The Work Task – Completed query can be used to close multiple work tasks simultaneously using the checkboxes next to each record.



If a completed work task is considered not acceptable, the service manager can re-open the task from the work task record. From the work task form, clicking the Re-Open action will change the status to Active.

ACTIVITY 3.2
Perform Work Task

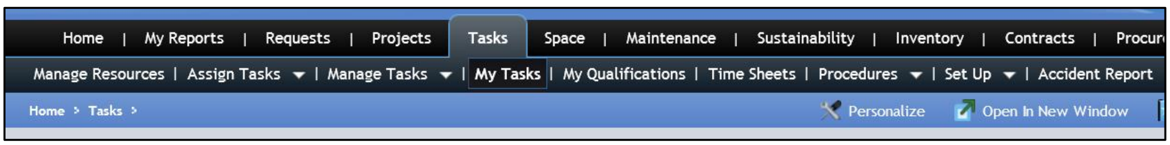
Scenario
Using the work tasks that you previously created, you are the technician responsible for completing the work task and entering in the task completion information into TRIRIGA.

Setup
- ✓ User is logged in to the TRIRIGA Home Page.

Steps

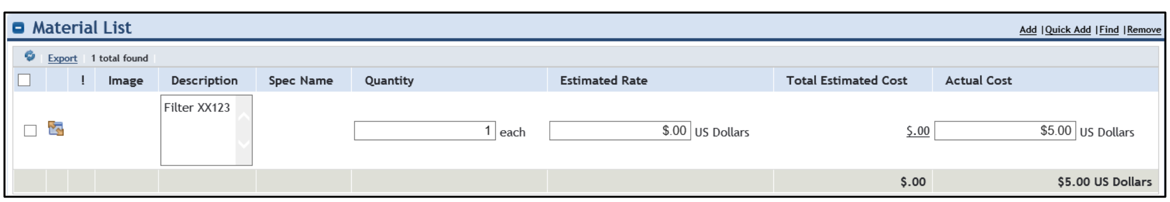
A. Navigate to the My Active Tasks portal.

1. Click the **Tasks** tab.
2. Click the **My Tasks** option in the sub header.



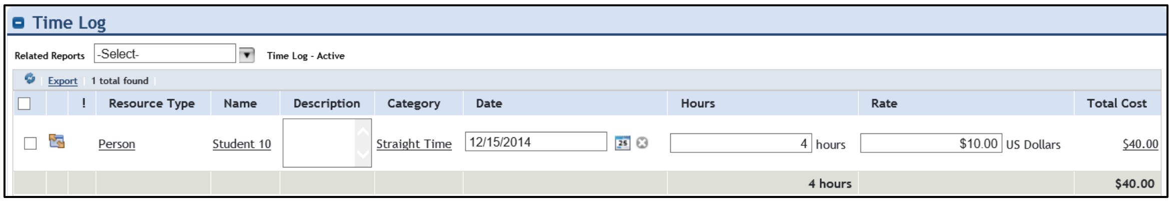
B. Complete the Work Task Info tab.

1. Click on the task and navigate to the **Resources** tab.
2. Verify that task is assigned to **Student ##**.
3. In the **Material List** section, click **Quick Add**.
4. In the **Description** field, enter ***Filter XX123***.
5. In the **Quantity** field, enter ***1***.
6. In the **Actual Cost** field, enter ***5.00***.



7. In the **Resources** section, click the **checkbox** next to **Student ##** and then click **Quick Add Time Entry**.

8. In the **Time Log** section enter ***4*** in Hours and ***10*** in Rate.



9. Navigate to the **Work Task Info** tab.
10. In the **Resolution Comment** section, enter ***## task complete***, where **##** is your student number.
11. Click **Save**.

3.3. Assigning Equipment

Each equipment or vehicle record managed in TRIRIGA can be assigned to locations and people.

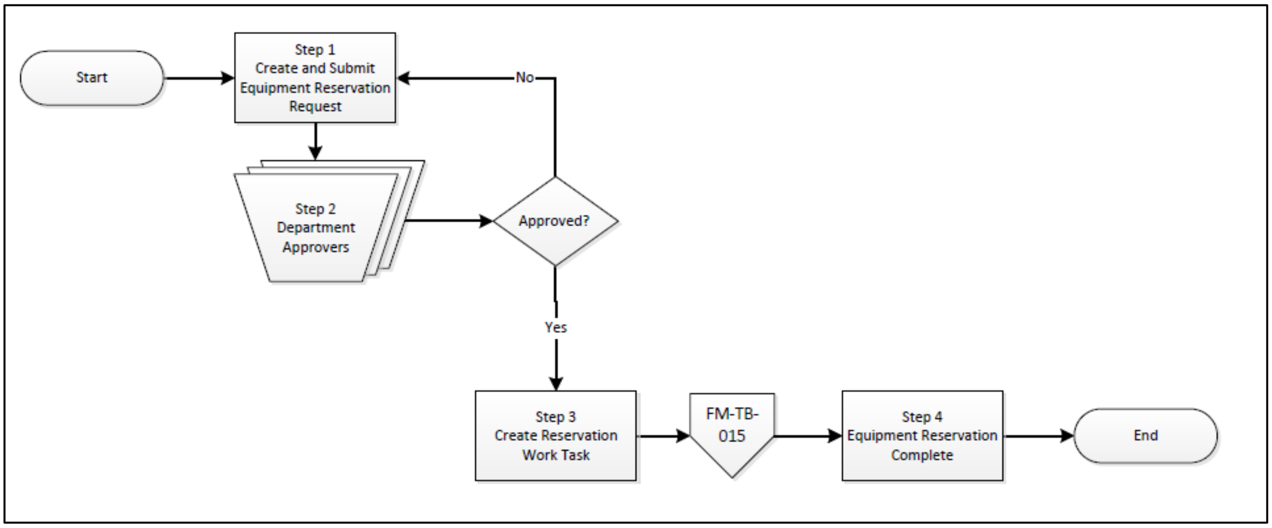
When assigning equipment, the user will only be presented with items currently available. Once assigned to a user the selected equipment or vehicle record becomes unavailable in the list.

State Process Overview

The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-016 (Equipment Reservation) and represented by CROSSREF below.

1. The user adds the required equipment to the work task as a resource.
2. After adding the equipment to the work task, it must be assigned to the appropriate person. The equipment record is opened, placed in a status of Revision in Progress and then assigned. The record can then be put into a status of Active again to prevent additional changes being made.
3. While the equipment is assigned to a person within a work task, it will not appear on the resource list for any other work tasks and therefore is unavailable for other assignments. The process of managing the performance of the work task continues with process FM-TB-015.
4. Once the work has been performed (FM-TB-015), the equipment can be unassigned by following the same process in step 2. The availability of the equipment record is updated for use by other users.

Figure 5: Equipment Reservation (FM-TB-016)



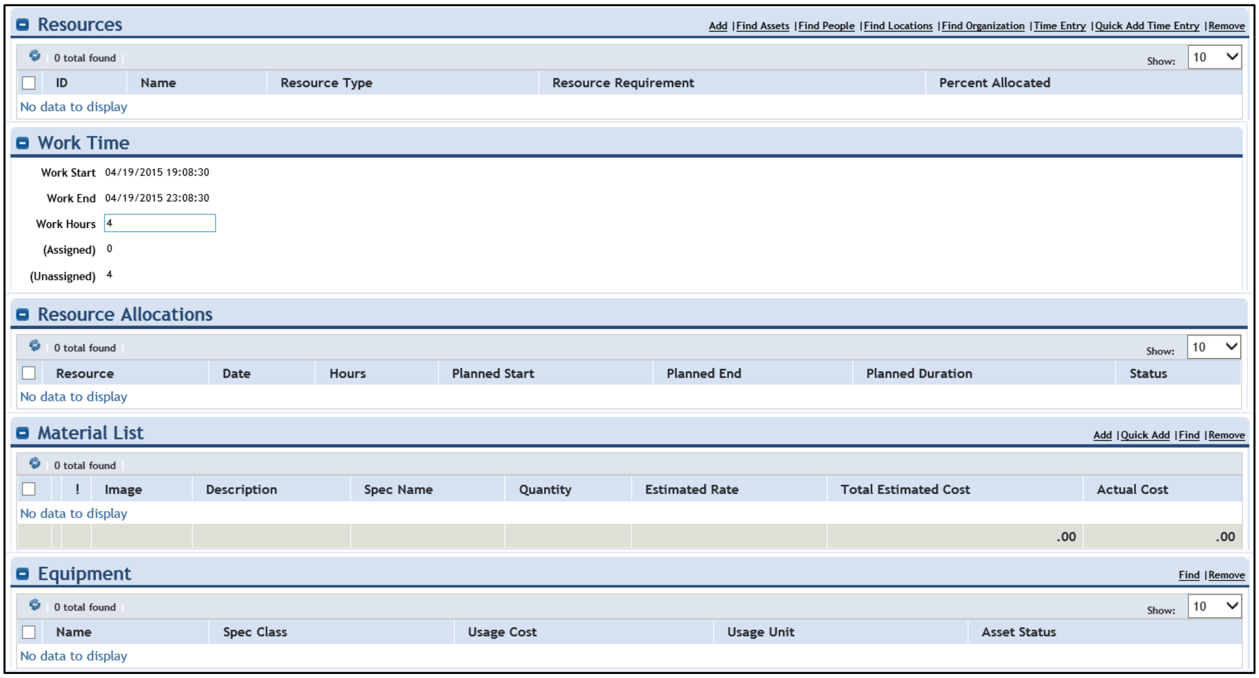
Manage Equipment Assignment

TRIRIGA can be used to manage the assignment of shared equipment.

A service technician updates the work tasks using the My Active Tasks portal section. The portal displays work tasks directly assigned to the technician. Work Tasks are opened by clicking on the task in the list. The technician can view the details of the assigned task, including any resources related to the task, the task location, task description, task planning dates, etc. The technician is allowed to modify some of the values on the work task directly.

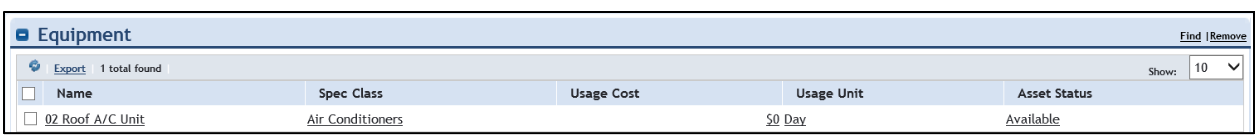
Resources Tab

On the Resources tab, the technician creates a resource entry for all parts and equipment used during the performance of the assigned work.



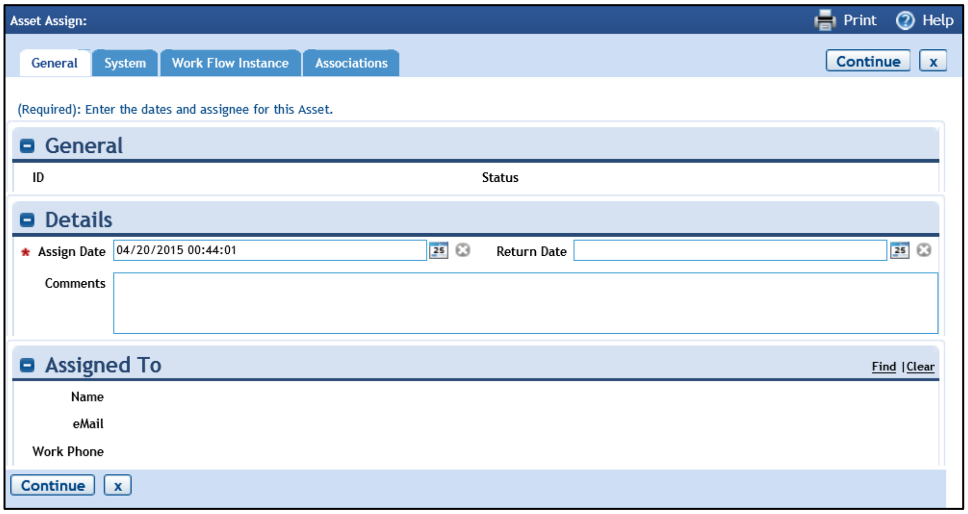
Equipment

On the Resources tab, Equipment section, the user can click the Find action to display a list of available equipment. From the list, the user selects all of the equipment items that were used to perform the work. When finished, click the OK action to save the equipment items to the work task.



Asset Status

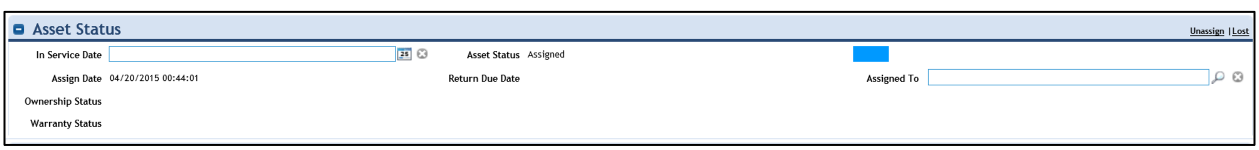
After adding equipment to the work task, it will need to be assigned. Clicking on the equipment item in the Equipment section will display the Equipment form.



On the form, in the Asset Status section, click the Assign action and complete the following fields:

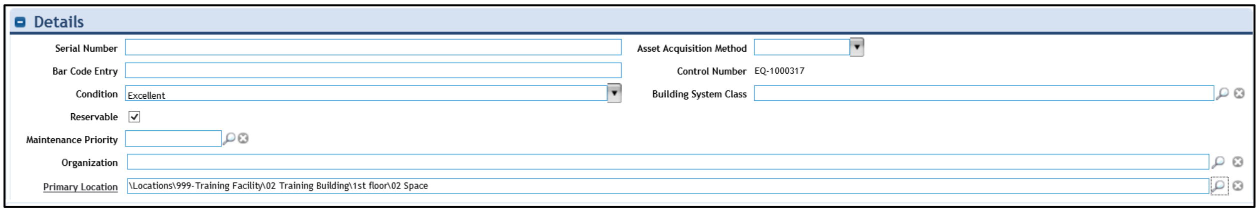
- **Assign Date** (Required)
- **Return Date**
- **Comments**
- **Assigned To**

When the necessary information has been entered, click the Continue button to assign the asset. The Asset Status will change to Assigned.



Details

After equipment is assigned, the location of the equipment may need to be changed. In the Details section, click the lookup icon for Primary Location. It may be necessary to clear the existing location by clicking the Clear Primary Location action. On the location lookup screen, select a location and click the OK action. The Primary Location of the equipment item will be updated. Click the Save & Close button to save any changes made to the equipment item.



On the Work Task, click the Save & Close button to save the changes to the Work Task.

ACTIVITY 3.3

Manage Equipment Assignment

Scenario

You are a technician responsible for completing work tasks using available equipment. You will add the equipment used to perform work to a work task and then update the Primary Location of the equipment.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

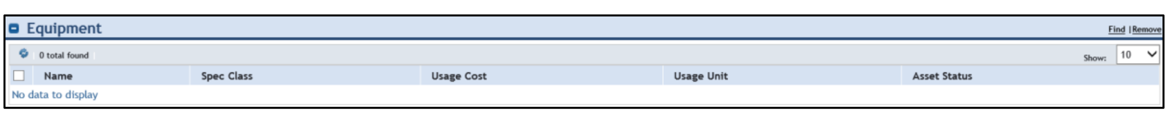
Steps

A. Navigate to My Active Tasks.

1. Click the **Tasks** tab.
2. Click the **My Tasks** option in the sub header to display the My Tasks landing page.

B. Update the Work Task with the equipment used to perform the work.

1. In the My Active Tasks section, click the **Task ID** of the task.
2. Navigate to the Resources tab and select **Find** in the Equipment section.

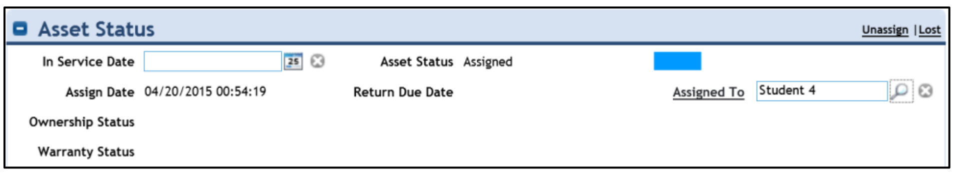


3. Select the **checkbox** to the left of ST ## Training Generator to be added to the work task
4. Click **Save**.

C. Assign the equipment to the user.

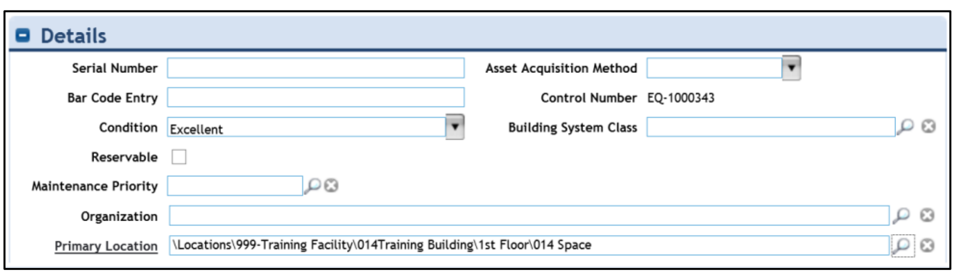
1. Click on the **equipment** to open the equipment record.
2. Click on the **Revise** action.
3. Click **Assign** in the Asset Status section of the equipment record.

4. Populate **Assign Date** and click **Continue**.
5. Click on the **Find** action in the **Assigned To** section and locate **your username** in the list.
6. Click on the **radio button** to the left of **your username** and then **OK**.
7. Click the **Continue** action.



D. Change the Primary Location of the equipment.

1. With the equipment record still open, click on the magnifying glass next to the **Primary. Location** field in the Details section.
2. Click on the **radio button** to the left of the desired location and then **OK**.



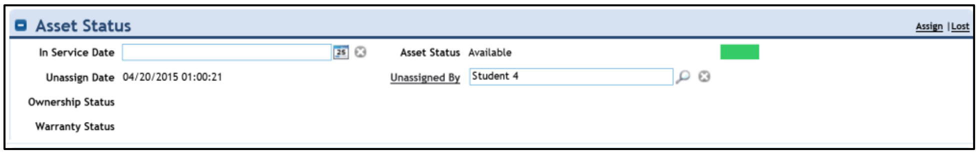
E. Save and Close the equipment record.

1. Click **Save & Close**.

F. Return the Equipment back to the system.

1. Click on the **equipment** to open the Equipment record.
2. Repeat **Step D** to change the **primary location**.
3. Click **Unassign** in the Asset Status.

4. Add any necessary comments and click **Continue**.



5. Click **Activate** on the equipment record to restore to a read only status.

ACTIVITY 3.4

Complete Work Task

Scenario

Continuing with the work task that you previously updated, you are the technician responsible for completing the task in TRIRIGA.

Setup

✓ User is logged in to the TRIRIGA Home Page.

Steps

A. Navigate to the My Active Tasks portal.

1. Click the **Tasks** tab.
2. Click the **My Tasks** option in the sub header.

B. Select the work task and click the **Complete** option.

Procurement of goods or services necessary to complete a task

There are often times when work is not performed directly by an internal work group and the department must procure the services of an external vendor. The task may also require materials or parts that are not kept in inventory and must be ordered before the work can be completed. In this case, the Service Technician would do the following:

- Determine goods or services needed to complete the task
- Place the Work Task on hold by clicking on the hold action and selecting hold for parts
- Communicate the items or services needed to the department Procurement Unit, following the current business process (eg, email, verbal, paper or electronic estimate, etc.)
- Include the Work Task ID number in the communication to the Procurement Unit.
- Confirm that the Purchase Order is correct after integration from ProcureAZ creates the PO record on the Work Task
- Any additional orders or changes to a current TRIRIGA PO will be facilitated through ProcureAZ

Perform Work Reporting

There are many ways for service managers to view reports on work tasks. The Home portal data for a service manager will display several links in the Reminders section for viewing task reports, including the Unassigned Task Report, Overdue Task Report, Tasks Due This Week Report, and Tasks Due Today Report.

There are also community reports available in the My Reports > Community Reports menu. These reports include:

- Crew Labor
- Major Maintenance Activity on Asset
- Material Orders
- Work Task – Completed – Editable
- Work Task – Manager – Query
- Exception Reports – Performance – All Orgs
- All Completed Tasks
- Competed Planned Tasks
- Unscheduled Tasks

Lesson Summary

In this lesson, you:

- Identified the process involved in performing work tasks

Check Your Progress

1. The Location hierarchy is defined as follows:
    a. Property > Building > Space > Floor
    b. Geography > Floor > Property > Space
    c. Property > Geography > Building > Floor
    d. Property > Building > Floor > Space

2. Which type of maintenance is performed when something breaks?
    a. Corrective Maintenance
    b. Preventative Maintenance

3. Closed tasks should be re-opened if work was not performed satisfactorily.
    a. True
    b. False

4. Reporting

Learning Objectives

In this lesson, you will:

- Review the reports available in TRIRIGA
- Review the creation of new reports

Lesson Overview

The reporting features in TRIRIGA provide many options for viewing information in new and different ways. There are different types of reports that can be used depending on how a user wants to view the information, whether in a report, chart, query, etc. This lesson will explore the reporting tools available in TRIRIGA.

4.1. My Reports

The My Reports portal is the central warehouse of reports. There are four tabs in the My Reports portal.

- **My Reports** – Any report available in the Community or System Reports tabs can be copied to this tab for personal use and quick access
- **Community** – Any report available in the System Reports tab can be shared on this tab for organization use and quick access
- **System Reports** – A complete list of available reports in TRIRIGA. On this tab, reports can be added, copied, or deleted
- **Administration** – A list of reports added to the personal My Reports tab for all TRIRIGA users

Filtering

Each tab in the My Reports portal contains filter fields that allow users to narrow down the number or reports displayed in the list. Any known information in the Title, Name, Tag, Module, Business Object, or Form fields can be entered as filter criteria in the corresponding field. The Display Type filter field provides a dropdown menu of all possible Display Types for selection, such as Report, Query, Chart, or Graphic.

13 total found | Apply Filters Clear Filters | Show: 50

		Title	Name	Tag	Module	Business Object	Form	Display Type	Owner Language
		use	Contains	Contains	Contains	Contains	Contains	-All-	
☐		Building records of Gross, Rentable and Usable Area by Building Primary Use	triBuilding - Building records of Gross, Rentable and Usable Area by Building Primary Use		Location	Building		Report	US English
☐		Building Tenure By Primary Use	triBuilding- Building records of Building Tenure by Primary Use		Location	Building		Report	US English

Running a Report

Running a report is done by clicking on the Run Report icon for the desired report in the second column from the left. The selected report will be displayed in a new window. Some reports may display "No data to display" if there are no returned items on the report. From the report window, the report can be exported straight to an Excel file by clicking the Export link in the top right corner of the report.

☐		Building records of Gross, Rentable and Usable Area by Building Primary Use	triBuilding - Building records of Gross, Rentable and Usable Area by Building Primary Use
☐		Building Tenure By Primary Use	triBuilding- Building records of Building Tenure by Primary Use
☐		Lease Clause associated to LA	triLeaseClause - Display - Associated to LA
☐		Lease Clause associated to LAT	triLeaseClause - Display - Associated to LAT
☐		Leases by Primary Use	triRealEstateLease - Portal - Lease Count by Primary Use
☐		Space Distribution by Current Use	triSpace - Space records of Space Distribution by Current Use

ACTIVITY 4.1

Run an Existing Report

Scenario

You want to look at a report in TRIRIGA. You will use the My Reports portal to find and run a report.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

Steps

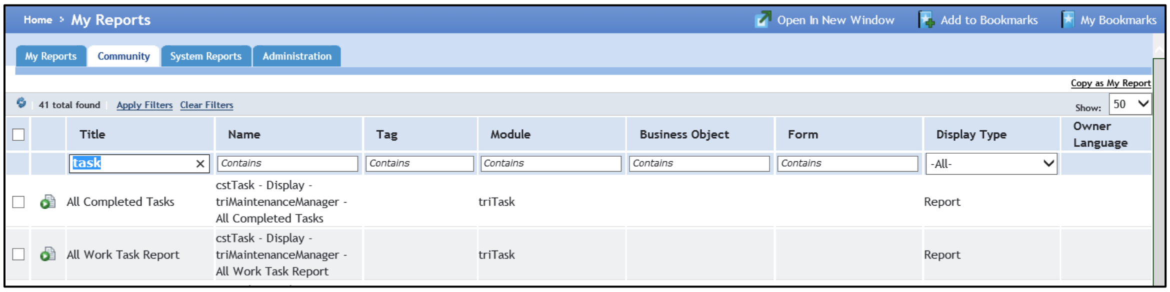
A. Navigate to the My Reports > Community portal.

1. Click the **My Reports** tab.
2. Click the **Community** tab.

B. Search for a report using the filter fields.

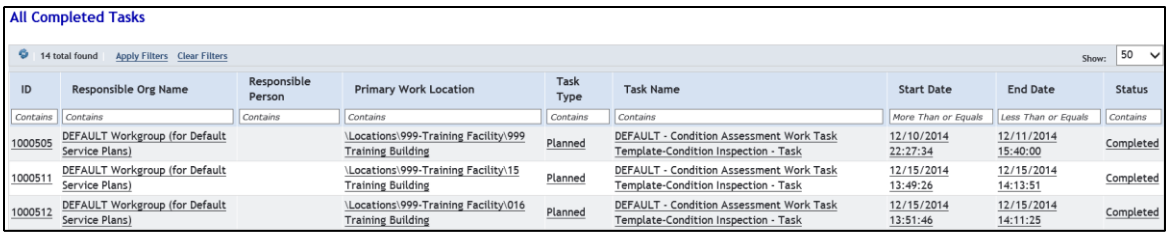
1. In the **Title** filter field, enter ***Task***.

2. Press **Enter**.



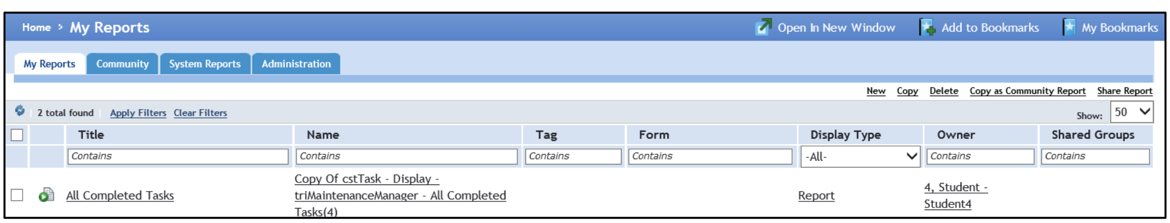
C. Run and review the report.

1. Click the **Run Report** icon for the **All Completed Tasks** report.



2. In the Report window, click the **Clear Filters** action.
3. Review the information in the report.

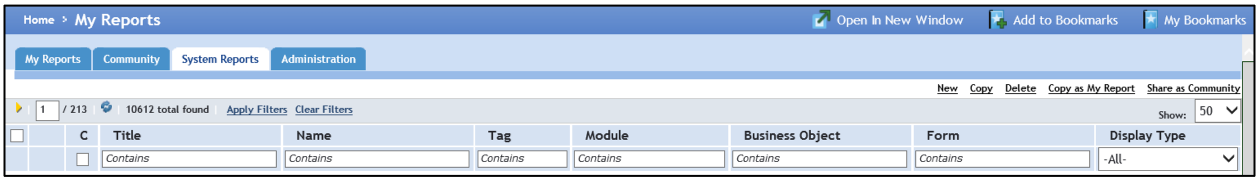
D. Copy the report to My Reports > My Reports.

1. Click the **Cancel** action to close the Report window.
2. Click the **checkbox** for the **All Completed Tasks** report.
3. Click the **Copy as My Report** action.
4. Click the **My Reports** tab.
5. 

6. Observe that the report has been added to the My Reports list.

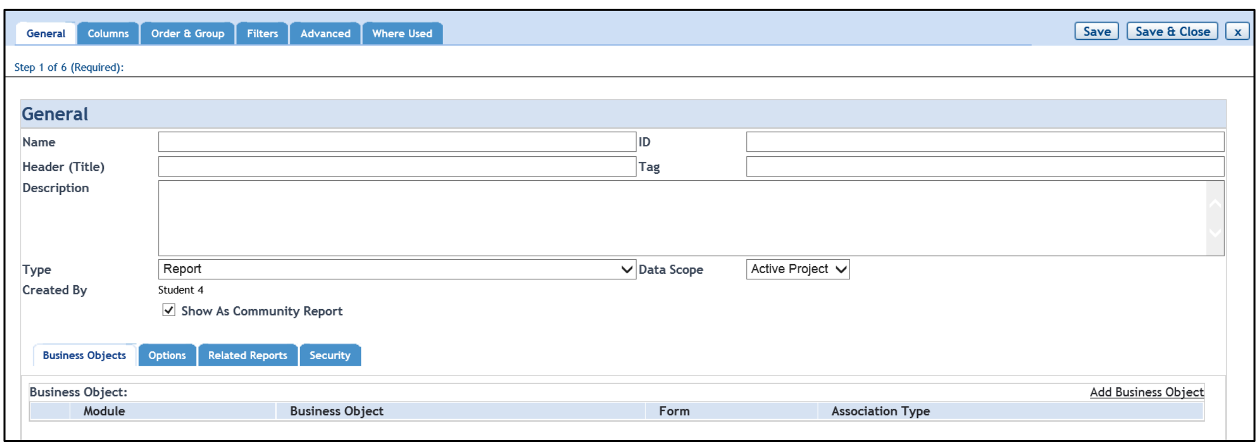
4.2. Creating a New Report

From the System Reports tab, users can create new reports by clicking the New option. This will display the Report Builder page.



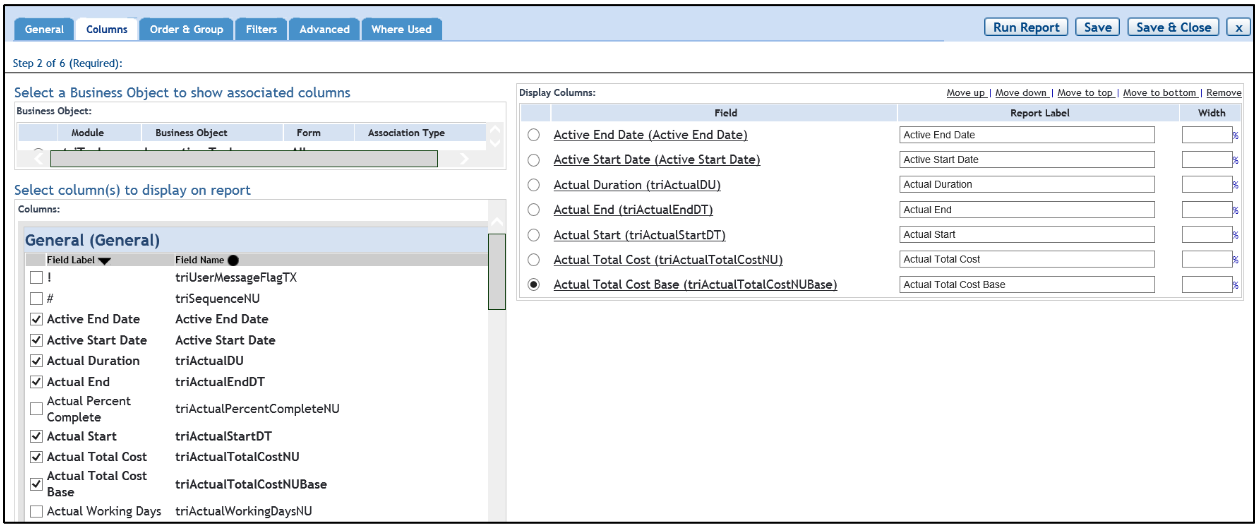
General

On the General tab of new report, enter a Name, Title, Description, and select a Type from the dropdown menu. The Business Objects tab is used to add reportable objects to the report by clicking the Add Business Object link on the right side of the screen. In the Business Object window that appears, the Module, Business Object, and Form can be selected from the available options. This tab is required in the report creation process.



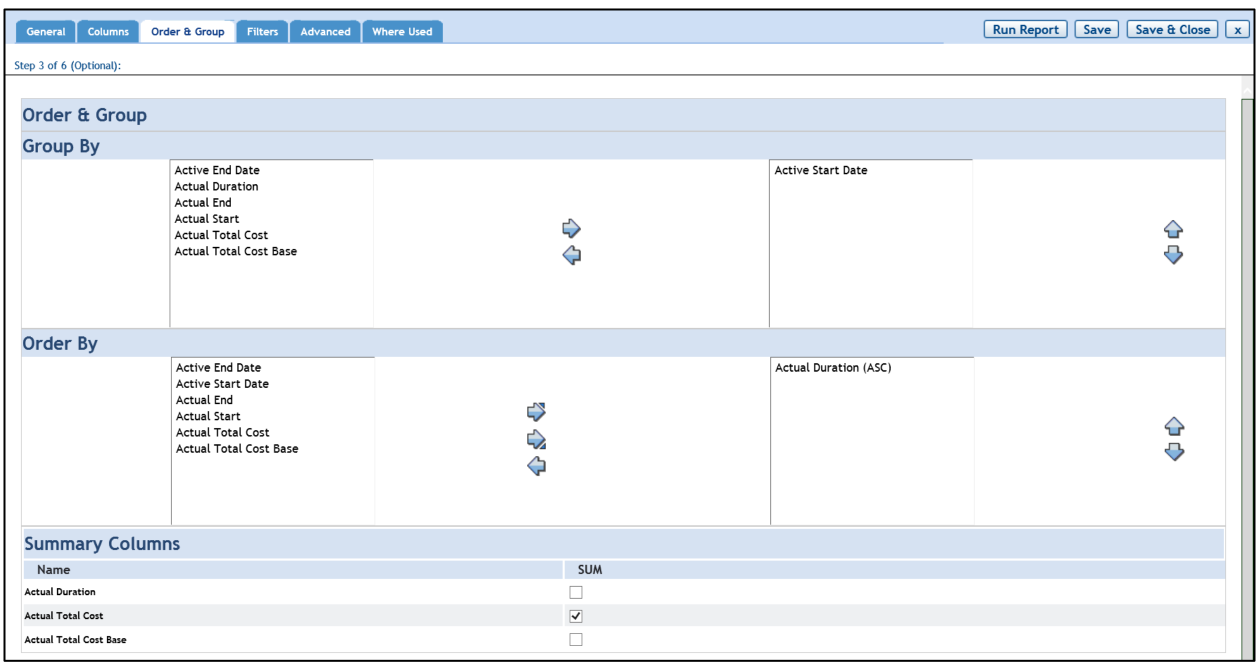
Columns

On the Columns tab, all of the available columns in the Business Object selected on the General tab are displayed in the list on the left. Checking the box for a column will add that column to the Display Columns section on the right. Columns can be reordered and removed using the links in that section. This tab is required in the report creation process.



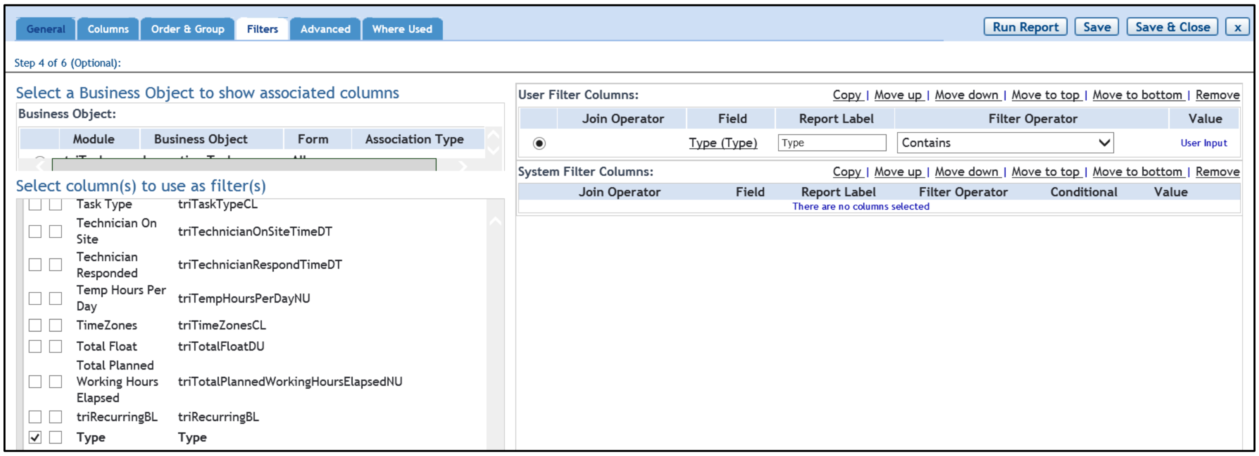
Order & Group

The Order & Group tab is used to specify the grouping and the ordering of the columns selected for the report on the Columns tab. Columns can be added to the groups on the right and reordered once added. This tab is optional in the report creation process.



Filters

The Filters tab is used to add user and/or system-definable filters to the report to be completed by the user when running the report. This tab is optional in the report creation process.



Once the report has been built, clicking the Save button will save the report. Clicking the Run Report button will generate the report with the options selected in the Report Builder.

Lesson Summary

In this lesson, you:

- Reviewed the reports available in TRIRIGA

Check Your Progress

1. Which tab in My Reports lists all of the available reports in TRIRIGA?
    a. My Reports
    b. Community
    c. Administration
    d. System Reports

2. Which tabs are required when creating a new report?
    a. My Report
    b. Order & Group
    c. Columns
    d. Only a and b
    e. Only a and c

Appendix A

ANSWER KEYS

Below are answer keys to the Check Your Progress quizzes provided at the end of each lesson.

Lesson 1

1. b. False 1.1 Overview of TRIRIGA Functionality
2. d. All of the above 1.3 Approvals
3. d. Both b and c1.4 Using Templates

Lesson 2

1. d. Property > Building > Floor > Space2.1 Manage Portfolio Locations
2. a. Corrective Maintenance2.5 Creat Corrective Maintenance Work Task
3. b. False2.7 Perform Work Task

Lesson 3

1. a. True3.1 Develop Condition Assessment Plan
2. c. Templates3.4 Manage Capital Project
3. d. Space and Floor3.6 Allocate Space and Track Occupancy

Lesson 4

1. a. True4.1 Create Real Estate Contract
2. b. False4.2 Manage Real Estate Contracts
3. d. Payment Method4.3 Manage Real Estate Payments
4. b. Real Estate Transaction Plans can contain many Real Estate Transaction Projects4.5 Manage Real Estate Transaction Project

Lesson 5

1. a. True5.2 Managing Space Reservation
2. d. My Active Tasks5.1 Assigning Equipment
3. b. Space5.2 Managing Space Reservation

Lesson 6

1. d. System Reports6.1 My Reports
2. e. Only a and c6.2 Creating a New Report